Fitness and Lifestyle at the Workplace

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CHAPTER 1

SETTING THE SCENE

HUBERT LAFRAMBOISE

Fitness activities and positive lifestyle programs are becoming an important part of the Canadian corporate culture.

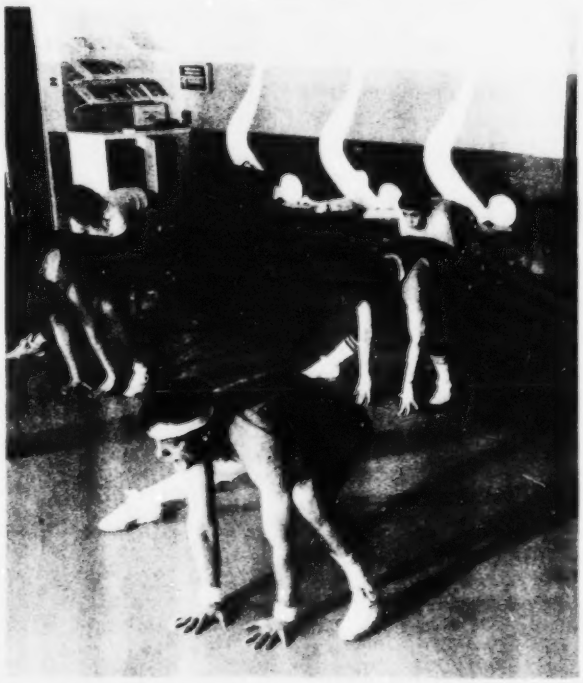
Fitness activities and positive lifestyle programs are becoming an important part of the Canadian corporate culture. In recent years there has been a rediscovery of the interdependence of mind and body and a growing understanding that the health of a company can be affected by the health and vitality of its employees.

In the early days, employee fitness was sometimes regarded as a way of diminishing the impact of cardiovascular disease on key executives. But the realization quickly grew that what was good for executives was good for the entire workforce. The seeds of this realization were planted in the early 1970s when the federal government directed considerable funding and energy to promoting the benefits of a healthy and fit workforce.

Pilot projects were initiated, conferences held, and in 1977, *Employee Fitness* [1] was published — the first concise, comprehensive and informative publication of its kind in North America. In 1978, a world-class fitness and lifestyle research project was launched in Toronto, sponsored by Fitness Canada, designed by the University of Toronto, and conducted by the YMCA. With the participation of Canada Life Assurance Company and North American Life Assurance Company, the study examined the impact of employee fitness on such factors as productivity, absenteeism, employee turnover, job satisfaction and health.[2] This landmark project gave substance to many of the claims being made on behalf of fitness in the workplace.

National organizations such as the Canadian Public Health Association, PARTICIPaction, the Canadian Chamber of Commerce, and the Canadian Labour Congress have used their publications and national networks to disseminate the fitness message.

While the impetus for employee fitness in Canada began at the federal level, it would not have prospered and developed were it not for the involvement of many other players. Provincial governments have invested money and manpower in support of fitness and health initiatives in their own jurisdictions. National organizations such as the Canadian Public Health Association, PARTICIPaction, the Canadian Chamber of Commerce, and the



Group fitness class at the Shell Place Fitness Centre; Shell Canada Ltd., Don Mills, Ontario

Hubert Laframboise, B.A.
As an official of Health and Welfare Canada, Hubert Laframboise was the principal author of the Treasury Board submission setting up PARTICIPaction; of the Ten-Year Masterplan for Fitness and Sport *(1972); and of* A New Perspective on the Health of Canadians *(1974), which highlighted lifestyle health problems.*

Canadian Labour Congress have used their publications and national networks to disseminate the fitness message. Universities have offered research expertise, and many public and private fitness organizations have provided creative thinking in programming and promoting physical fitness and healthy lifestyles.

The efforts of those mentioned above would have had little impact, however, had it not been for those employers across the country who believed that real personal and fiscal benefits could be derived from a healthy and physically-active workforce.

FUTURE DIRECTIONS

1986 was a vintage year for consolidating information and proposing initiatives in what is still a field rich with opportunity. The recommendations of the Canadian Summit on Fitness [3] with respect to workplace programs constitutes a compendium of objectives, strategies, resource needs, incentives and leadership requirements. Canada can now set goals from a solid base and measure its progress as it moves toward *and* into the 1990s.

The exploratory phase of employee fitness is over. The pilot projects have been completed. The experimental initiatives have been evaluated. Many of the creative concepts have been given the figurative "kicks-at-the-cat". In brief, the field is mature, the evaluative techniques are sophisticated, and planning for the future can be based on sound experience and on a clear identification of remaining problems.

The major challenge we now face is the creation and delivery of programs for small business and for the blue-collar worker.

A number of recent national and provincial reports suggest that the major challenge we now face is the creation and delivery of programs for small business and for the blue-collar worker. This does not imply that nothing remains to be done in other employment sectors, but recognizes the fact that the majority of advances in employee fitness to date have been among office (or white-collar) employees.

WHY THE WORKPLACE?

Taken in its broadest economic terms, the fitness of Canadian employees is one "weapon" in the competition for world trade. It is not surprising that two countries with the most vigorous employee fitness programs — Japan and West Germany — are also vigorous competitors in world trade. In Japan, where there is an abundance of employee fitness and recreation programs, employees tend to feel that their company has a genuine interest in their well-being. This creates a bond causing employers

Workers participating in an exercise break; Consolidated Bathurst, New Richmond, Québec

and employees to knit together into a strong fabric of productivity.

The workplace is a natural community. It can be a place where employees have the social and administrative support to be active and have access to exercise and shower facilities. This kind of environment increases the likelihood that people *will* be active, because people are sensitive to their peers and their culture.

Mobil Oil employees during a group fitness class; Calgary, Alberta

Employee fitness programs can put positive caloric expenditure back into the working day.

The combination of cars for commuting, television at home, and technology in the workplace has left too many employees underexercised and overweight. Employee fitness programs can put positive caloric expenditure back into the working day.

IN THE FOLLOWING CHAPTERS

To help with future efforts, this book offers a state-of-the art summary of employee fitness and lifestyle programs in Canada. It outlines what has been accomplished, what has been learned, and where we can go from here. It includes summaries of important research and practical program ideas, along with insights and advice from some of the leading professionals in the field.

Chapter 2 serves as a base. It discusses a number of important fitness and lifestyle concepts, defines physical fitness, looks closely at our excercise requirements, and opens the subject of program promotion. Chapter 3 goes beyond the physical. The costs and benefits of programs are examined with the bottom line always in mind.

Chapter 4 begins to address practical program considerations. What better place to start than with leadership? Chapter 5 turns to the participant, with a look at recruitment and retention. Chapter 6 focuses on three special employee groups: industrial and service sector employees; employees in small-business establishments; and the geographically dispersed.

Chapter 7 deals with the crucial role fitness and lifestyle programs can play during training and professional development. Practical tips for program planning are provided, and the experience in several different settings is described.

Chapter 8 goes south of the border. There are exciting developments on a number of fronts in the United States, and there is much we can learn from our neighbours to guide us as we develop programs at home.

Chapter 9 concludes the text. Taking an "everything-you-ever-wanted-to-know-about-employee-fitness-but-were-afraid-to-ask" approach, it answers the 10 most common questions on the topic.

References to various research studies, journal articles, reports and other publications are noted throughout the text. For ease of presentation, these have all been included in one section at the back of the book. You are encouraged to search out any of these resources which you might find interesting or useful. Appendix 1 lists additional resources. It offers a wealth of information on the topic.

One final word in setting the scene: employee fitness is a serious matter. Companies cannot afford to look upon it as an optional extra nor as a philanthropic venture. As Chapter 3 clearly shows, employee fitness programs *do not* constitute a burden on the employer. They can, instead, become profit centres from which both employers and employees emerge as winners. Employee fitness and lifestyle programs can provide the elusive "double plus" for which employers are always searching.

CHAPTER 2

FITNESS AND LIFESTYLE

MARTIN COLLIS

Fitness can contribute as much to the Nation's health as immunization and sanitation advances have done in the past.

— Dr. R. Egeberg

Health is an elusive term to define. It is not dispensed by physicians, nor can it be quantified merely in terms of longevity. The World Health Organization defines it as follows:

> "Health is a state of physical, mental, and social well-being and not merely the absence of disease or lack of infirmity. Health is an optimal rather than a maximal condition of personal fitness and measures the functional ability of the human organism to live effectively, efficiently and happily."[1]

It became clear at the 1986 Canadian Summit on Fitness that terms such as total fitness, holistic fitness, wellness, well-being and health are now being used interchangeably. They are used to describe "a positive, dynamic state of well-being whereby an individual, through a sense of self-responsibility, is continually moving toward his or her potential for optimal functioning."[2]

Martin Collis, Ph.D.
Martin Collis is a professor of physical education at the University of Victoria. He worked with Fitness Canada to author Employee Fitness *1977 and* The Phacts of Life *1985. He is a co-developer of PAR-Q and has done considerable consulting in employee fitness including work with the President's Council on Physical Fitness and Mesa Petroleum.*

In *Fitness . . . The Future*, the report summarizing the Canadian Summit on Fitness, an effort was made to show the place of physical fitness in the total fitness picture.

> "Physical fitness is just one element albeit an important one of total fitness or well-being. It is one of a number of positive lifestyle habits which contribute to well-being. *Traditionally, physical fitness has been defined as the ability to carry out daily tasks with vigor and alertness, without undue fatigue, and with ample energy to enjoy leisure-time pursuits and to meet unforeseen emergencies.* To go beyond this simple statement of philosophy, physical fitness, in an applied sense, can be looked upon as a set of attributes to functional capactiy that are related to the ability to perform physical activity. These attributes are the specific components of health-related physical fitness: body composition, aerobic capacity, muscular strength, flexibility and muscular endurance."[3]

In addition, some fitness practitioners feel that balance and coordination are important — especially for youth and older adults. Moreover, developing balance and coordination requires a keen sense of body awareness and posture — so important in stress management.[4]

Petro-Canada employees during an aerobics class; Club 32, Petro-Canada Resources Ltd., Calgary, Alberta

For employees to function effectively in the work environment they need to be healthy and fit enough to respond to the multiple demands of life and work.

While there may be some semantic problems, it is abundantly clear that for employees to function effectively in the work environment they need to be

healthy and fit enough to respond to the multiple demands of life and work.

Fitness behaviours can influence such things as self-esteem, diet, stress and the whole matrix of health and well-being.

While the term fitness implies a physical activity focus, it must be remembered that *total* fitness is a seamless cloth and that fitness behaviours can influence such things as self-esteem, diet, stress and the whole matrix of health and well-being.

Fitness program at Pratt and Whitney Canada; Montréal, Québec

THE CANADA FITNESS SURVEY

In 1981, the Standardized Test of Fitness, which includes all the measures noted above except balance, was used as a part of the landmark Canada Fitness Survey (CFS). The CFS sampled 23,000 people in all parts of Canada and provided a national profile on physical fitness, body size and composition, blood pressure and lifestyle. In the past, nobody really knew the physical characteristics of the famous "30-year-old Canadian", but as the data from the CFS became available, it was possible to refer with confidence not only to the average 30-year-old Canadian, but to the average Canadian at any age from 7 to 69.[5]

More than half the population* claim *to be physically active in their leisure time and more than three-quarters of the population wish to increase their participation levels.

At first glance, the CFS seems to reflect an active populace, with nearly 6.5 million joggers, nearly 12 million walkers and over 7 million cyclists and swimmers. More than half the population *claim* to be physically active in their leisure time and more than three-quarters of the population wish to increase their participation levels. This gives the appearance of an active population who wish to be even *more* active, but whatever Canadians are doing, *or say they are doing*, is not enough to provide the sort of stamina, or oxygen-using ability, consistent with optimal health.

Aerobic fitness was measured in the CFS by means of a step test. On the basis of this test, participants were judged to have either a recommended, minimum, or acceptable level of personal fitness. It should be noted that the *recommended level* is a modest and easily attainable goal for an active adult.

A number of facts stand out from an examination of the CFS data:

- There is a major decline in aerobic fitness in the 20- to 29-year-old age group. This means that any employee fitness initiatives should not assume that their young employees are in good shape. The 20- to 29-year-olds are in particular need of regular aerobic training.
- For those over 40 years-of-age, there was a substantial number of refusals to take the test, and many others were screened out as potential health risks. This means that the sample actually tested was biased toward the fitter, healthier segment of the population.
- Despite the above, less than half of Canadians tested attained the recommended level of stamina for their age group.

Some of the most interesting findings from the Canada Fitness Survey are the measurements of blood pressure and fatness, summarized in the following table.

Table 1

Health Risk Factors

Risk Factor	*Male*	*Female*
High Blood Pressure (hypertension)	22%	13%
Overweight, but not obese	40%	28%
Obese	9%	12%

Simply stated, almost half the male population of Canada is overweight, and nearly a quarter of them have high blood pressure. Canadian women fare a little better but are still far from satisfactory. In absolute numbers, high blood pressure affects 2.5 million Canadian adults age 20 to 69. In this same age group obesity affects more than 1.5 million and a further 5 million are overweight but not obese.

Regular physical activity is important in achieving caloric balance and weight control or weight loss.

High blood pressure and being overweight are generally acknowledged by health professionals as risk factors in cardiovascular disease and other metabolic problems. Regular physical activity is important in achieving caloric balance and weight control or weight loss. Controlled physical activity can also play a role in reducing high blood pressure, although medical advice should be sought before involving hypertensives in a physical activity program.

A paper summarizing results of the Canada Fitness Survey makes the following statement:

> "Fewer than one in four Canadian adults is active enough to be likely to experience cardiovascular benefits. This in combination with a general deterioration of physical fitness among adult Canadians as they age and observations of increasingly prevalent hypertension, overweight, and obesity is indicative of a major public health challenge."[6]

Clearly, we have a population that has much to benefit from fitness and lifestyle initiatives. If these take place at the worksite, both employers and employees will share the benefits.

The CFS documents that active Canadians are fitter, healthier and less likely to smoke. While one cannot claim that fit, healthy, non-smokers make better employees, it will be easier for them to perform at their best over extended time periods.

Indoor track at Club 32; Petro-Canada Resources Ltd., Calgary, Alberta

Three, 20 to 30 minute workouts per week, at the appropriate target heart rate, is an acceptable minimum for cardiovascular development.

EXERCISE REQUIREMENTS

Building on the work of Dr. Kenneth Cooper, exercise scientists now generally agree that three, 20 to 30 minute workouts per week, at the appropriate target heart rate, is an acceptable minimum for cardiovascular development and the possible prevention of premature heart disease. (Target heart rate equals 60 percent or more of the distance between your resting heart rate and maximum heart rate.) Dr. Cooper's now famous aerobics point system is designed so that 30 points-a-week earned from a variety of aerobic activities should maintain a good state of cardiovascular fitness.[7]

Adequate exercise — 2000 calories worth per week — can add approximately two years to a person's lifespan.

A study by Paffenbarger and colleagues documents that the number of calories expended per week has a significant impact on cardiovascular and respiratory health.[8] He suggests that adequate exercise — 2000 calories worth per week — can add approximately two years to a person's lifespan. If this seems relatively insignificant, it is comparable to the increase in life which could be anticipated if a cure for cancer were found. The calories can be expended by normal daily activities such as

walking and stair climbing, in addition to more vigorous activities. In a letter to the *New England Journal of Medicine*, Petty and Herrington used Paffenbarger's data to calculate that each step climbed on a staircase instead of riding the elevator could add four seconds to one's life.[9] This is perhaps an extreme example, but one which underlines the fact that the benefits of physical activity are cumulative.

Aerobics area at the Shell Fitness Centre; Calgary, Alberta

The impact of consistent physical activity (2000+ calories per week) was even evident among smokers, the overweight, hypertensives, and those with a parental history of early death. Clearly, regular calorie-burning activity has a beneficial result on the human organism.

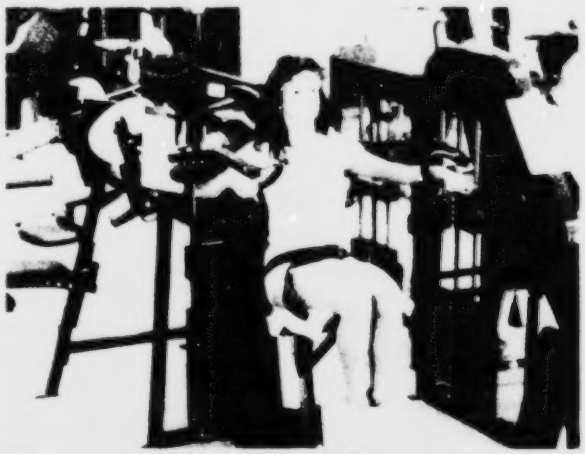
The 1978 report, *Physical Activity in Canada*, suggests that fitness related activities can be important in stimulating other positive lifestyle changes:

> "Physical activity is a positive quantity. It is something that one adds to one's life, not something one takes away. In addition, many of the physiological, social, economic and psychological benefits can be realized almost as soon as one takes up regular physical activity. It would thus appear that the promotion of physical activity should be easier than the promotion of no smoking, moderate drinking, and proper nutrition. This, coupled with the secondary effects of physical activity on other health behaviours, should make physical activity the keystone of integrated health promotion strategies."[10]

There has been a growing realization among North American employers that they can help optimize the health and performance of their employees by the promotion and facilitation of healthy lifestyles.

PROMOTING POSITIVE EMPLOYEE LIFESTYLES

There has been a growing realization among North American employers that they can help optimize the health and performance of their employees by the promotion and facilitation of healthy lifestyles. Traditionally, health care has meant looking after people when they are sick. More recently, it has come to mean structuring programs which help people stay well.



Weight training area at Club 32; Petro-Canada Resources Ltd., Calgary, Alberta

This concept is not new. It was clearly stated in Marc Lalonde's landmark document, *A New Perspective on the Health of Canadians*, published by Health and Welfare Canada in 1976.

> "When the full impact of environment and lifestyles has been assessed, there can be no doubt that the traditional view of equating the level of health in Canada with the availability of physicians and hospitals is inadequate. Marvellous though health care services are in Canada, there is little doubt that future improvements in the level of health of Canadians lie mainly in improving the environment and moderating self-imposed risks."[11]

Lalonde defined lifestyle (one category in his Health Field Concept) as the aggregation of decisions by individuals which affect their health and over which they more or less have control.

Despite the words of Lalonde, and despite the fact that we know that people's productivity, health and lives are largely affected by the "diseases of choice," little has happened with respect to our fiscal priorities in health. Spending is still overwhelmingly concentrated on cure rather than prevention.

Canadian national expenditures on health protection, health promotion, epidemiology, and other public health activities amount to less than two percent of the total expenditures on medicare.

In his 1985 discussion paper, "Issues in Preventive Health Care," Ray Jackson addressed this concern well, saying: "It seems less than optimum that the Canadian national expenditures on health protection, health promotion, epidemiology, and other public health activities amount to less than two percent of the total expenditures on medicare."[12]

Minister of National Health and Welfare, Jake Epp, addressing the Canadian Public Health Association in 1986, noted that a change in emphasis was timely, saying: "It makes sense that we have an appropriate health promotion strategy to complement the health care and health protection strategies that my department already has in place."[13]

The power of environmental and lifestyle factors can be demonstrated by the use of instruments such as the Health Hazard Appraisal (HHA). HHA assesses the interaction of a variety of everyday risks which people assume, or to which they are exposed, and which can affect both the quality and quantity of life. Four classes of information about the individual are recorded as follows:

- lifestyle factors such as smoking, drinking, exercise and driving practices;
- physical status;
- medical screening information;
- personal or family history of certain diseases.

The information is collated to produce an "appraised age," which could be greater or less than chronological age depending upon one's lifestyle and other factors. It can be a shock to a 40-year-old to be given an appraised age of 47; or it can reinforce and encourage another 40-year-old who might have an appraised age of 33. In both cases, HHA is instructive and can motivate individuals with regard to lifestyle.

The impact of lifestyle and personal habits on health is clearly demonstrated in research conducted by Belloc and Breslow.[14] They studied 7,000 people to determine some of the major influences on good health and longevity, and found the following common sense health habits to be important:

- seven to eight hours sleep each night;
- a good breakfast to start the day;
- minimal snacking between meals;
- no weight fluctuations;
- regular exercise;
- no smoking;
- moderate alcohol intake.

It was found that those following three or less of the good health practices had a death rate four times higher than those who practiced seven good habits.

In a follow-up study five years later with the same group, it was found that those following three or less of the good health practices had a death rate four times higher than those who practiced seven good habits. The average health status of people over age 75 who followed all seven positive health practices was the same as those aged 35 to 44 who followed fewer than three.

There is no company whose employees could not gain multiple benefits from positive lifestyle intervention programs.

It is clearly in the interest of employers to facilitate and encourage healthy lifestyles for their employees. Despite the tremendous progress we have made in increasing adult participation in physical activity, and despite the many awareness programs that have been mounted, too many Canadians still smoke, drink more than moderately, are overweight, have high blood pressure, or suffer from too much stress. There is no company whose employees could not gain multiple benefits from positive lifestyle intervention programs.

CHAPTER 3

COSTS AND BENEFITS

MICHAEL H. COX

"When looking at a company's balance sheet, the waist line does have a relationship with the bottom line."
— Harold Milavsky
Chairman of the Board
Canadian Chamber of
Commerce, 1985-86

Rising national health-care costs, increases in workers' compensation claims, high levels of absenteeism, and slow growth in productivity over the years have caused companies to be more and more concerned about their human resources.

An article in the *Harvard Business Review* noted that "corporate expenses for health care are rising at such a fast rate that, if unchecked, in eight years they will eliminate all profits for the average Fortune 500 company and the largest 250 non-industrials."[1]

In a three-year period from 1978 to 1980, GM reportedly spent three times as much on health insurance for its employees as it did on steel to manufacture its automobiles.

Michael H. Cox, Ph.D.
Michael H. Cox, formerly of the University of Toronto, is now the Director, Human Performance Division, The Graduate Hospital of Philadelphia Sports Medicine Center. He was the research coordinator on the Canada Life Study and over the last several years has conducted several employee fitness research projects and consulted on many employee fitness programs across Canada.

General Motors in the United States offers a prime example of the problem. In a three-year period from 1978 to 1980, GM reportedly spent three times as much on health insurance for its employees as it did on steel to manufacture its automobiles.[2]

In response to these concerns, there is an increasing interest in preventive health efforts, with employee fitness programs often serving as a focal point of activity in the corporate setting. And with good reason. Research over the years has shown that effective programs can improve employee health, reduce absenteeism and turnover, change attitudes and feelings, improve energy levels and reduce fatigue.[3,4,5]

Noon-hour aerobics class at the Texercise Centre; Texaco Resources Ltd., Calgary, Alberta

Despite employee fitness research results, the promotional efforts of governments, and the endorsement of the concept by many reputable companies, the great majority of businesses are still hesitant to proceed with programs. In fact, studies carried out in Ontario in 1984 [6] and in British Columbia in 1985 [7] show that less than 10 percent of companies in these two provinces offer definitive employee fitness and lifestyle programs. A survey done by the Canadian Chamber of Commerce in 1987 confirmed these results.[8]

This hesitancy may come partly from the difficulty companies have in measuring the value and cost-effectiveness of programs. This concern for measurability is in line with the general business philosophy that all budgeted programs should meet specific criteria so that informed decisions can be made on the kind of support they should receive.

To assist in these efforts, this chapter discusses the various costs and benefits of an employee fitness program and offers some guidelines for comparing and evaluating them. The first section considers the important fitness—health—productivity link. The effects of fitness on health-care costs

and industrial injuries are then examined followed by a section on absenteeism, turnover and productivity that outlines the experience of programs in both Canada and the United States. The final section — Measuring Cost Effectiveness — provides a cost-benefit worksheet as well as a profile of one company's experience in this area of program evaluation.

THE FITNESS—HEALTH—PRODUCTIVITY LINK

Heart disease kills more people in North America than the next four leading causes of death combined (including all types of cancer). This discouraging statistic is counterbalanced by the fact that, in many cases, heart disease is preventable.

Research on heart disease shows that it is clearly affected by lifestyle. Factors increasing the risk of heart disease include high blood pressure, cigarette smoking, high blood fats, and an inactive lifestyle. All of these risk factors are modifiable, and education over the years has focused on them in attempts to encourage people to live more healthfully.

Regular physical activity can play a unique and important role in disease prevention. A study of 117,000 people, reported in the *Journal of the American Medical Association*, showed that on a community basis inadequate physical activity was the strongest predictor of a risk of heart attack.[9] Regular exercise is associated with a reduction in blood pressure and a lowering of blood fats. It also assists in weight control and serves as a stress reducer.

In 1971, Canada lost an estimated 193,000 person-years of production due to premature death from heart disease. This number had risen to 250,000 person-years by 1982.

In addition to the deaths, chronic illness and human suffering it causes, heart disease has serious economic implications. In 1971, Canada lost an estimated 193,000 person-years of production due to premature death from heart disease.[10] This number had risen to 250,000 person-years by 1982. Unfortunately, many individuals are afflicted during their most productive years.

Fitness Canada has conservatively estimated the direct and indirect health costs at $2.5 billion annually for diseases associated with physical inactivity.

Fitness Canada has conservatively estimated the direct and indirect health costs at $2.5 billion annually for diseases associated with physical inactivity (i.e., heart disease, hypertension, obesity and osteoporosis).[11] Illnesses such as these are major causes of absenteeism which was estimated to cost Canadian industry $4.9 billion in 1977.[12]

Attempts to improve the lifestyle habits of adults can be costly and frustrating. In this regard, health education programs alone have not been particularly successful. Few studies have shown changes in behaviour, whereas most research has demonstrated a wide discrepancy between health knowledge or attitudes and health actions. A combination of methods must be used, and a change in environment is an important component of any program.

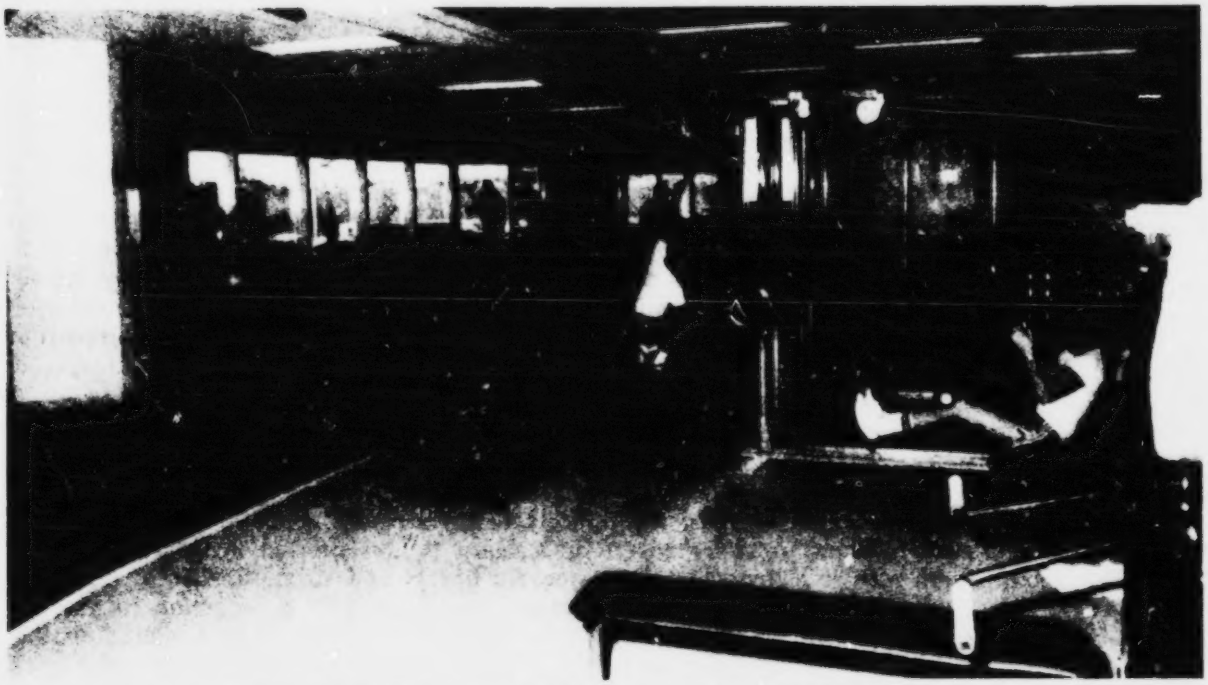
In the occupational setting, this change in environment could be the addition of an employee fitness and lifestyle program. An effective program can do much to address both the personal health and economic concerns discussed above. It can also have a positive effect on some of the business considerations mentioned at the beginning of the chapter and discussed at length in the sections that follow.

THE EFFECTS OF HABITUAL ACTIVITY ON HEALTH-CARE COSTS

Health-care costs are high in North America and in some cases are approaching a point where it is beyond the country's capacity to finance them.[13] Unfortunately, the increased expenditures in medicine over the years have not realized a matching improvement in health on a community basis.[14]

A substantial percentage of our health-care dollars are spent on treating preventable conditions. Thus, it is of major interest and importance to reduce medical costs through increased physical activity and improvements in other lifestyle habits.

On a national level, substantial economic gains are possible if Canadians can be motivated to maintain an adequate level of fitness. A study of Ontario Hospital Insurance Plan (OHIP) participants indicated, for example, if all adults 20 to 69 years-of-age reached at least a modest level of aerobic fitness, the immediate annual savings in OHIP payments would be $31 million. In turn, the associated decrease of coronary factors would lower future OHIP costs by an additional $13 million per year.[15] The significant impact on federal health-care transfer payments would be obvious if all provinces could persuade their residents to improve their fitness levels.



The Esso Plaza Fitness Centre, Individual Exercise Area; Esso Resources Canada Ltd., Calgary, Alberta

Hospital usage by those at the experimental company decreased from .27 to .09 days per worker-year, while at the control company they increased from .13 to .51.

On a company level, a recent Canadian study showed the effects of an employee fitness program on corporate health-care costs.[16] Over the period of the study, OHIP costs increased sharply at the control company, while showing almost no change at the experimental company. Moreover, hospital usage by those at the experimental company decreased from .27 to .09 days per worker-year, while at the control company they increased from .13 to .51. The direct saving to OHIP was calculated at approximately $130 per participant. There was speculation that the fitness program could lead to an increase in specific medical costs — electrocardiographic and orthopaedic services, for example — but no increased claims were found.

Recent Canadian data suggests that the average work-related injury claim is $1,120 which translates to an expense of about $128 per worker-year.

INDUSTRIAL ACCIDENTS

Factors contributing to work-related injuries include a lack of physical fitness (fatigue), obesity, poor posture, faulty techniques of lifting and lack of mental alertness. Recent Canadian data suggests that the average work-related injury claim is $1,120 which translates to an expense of about $128 per worker-year.[17]

An additional $451 per worker-year can be added for indirect costs, including loss of productivity, material damage and industrial retraining. Back injuries are particularly troublesome and costly. Ontario data from as far back as 1972 shows a cost to the provincial medical system of $19.4 million per year due to industrial back injuries alone.[18] Interestingly, back injuries are common in industries requiring infrequent vigorous activity or lifting just as they are in industries with more physically demanding jobs.

Automation is changing the face of conventional Canadian industry with work generally becoming less physically demanding. The most prominent example is the automobile industry where assembly lines are being transformed by hi-tech robotic machines.

General Motors of Canada is taking a lead role in the automation process. However, with a concern for employee morale and industrial accidents re-

lated to boredom and lack of mental alertness, the company is also instituting an employee fitness program which could be considered a model for the industry. Some authorities have suggested that such a fitness program could lead to a reduction in job-related injuries by as much as 50 percent.

Regardless of how the program is organized, employee-participants stand to improve the strength of their muscles, ligaments, and bones; increase their resistance to fatigue; and improve their reflexes, all of which will contribute to a better handling of required tasks. The importance of these factors in injury prevention is obvious.

ABSENTEEISM, TURNOVER AND PRODUCTIVITY

Absenteeism and turnover are serious — and costly — problems for Canadian business. In some industrial sectors, absenteeism runs as high as 23 days per worker-year. Coincidentally, job satisfaction and illness have a significant influence on work attendance. The study summaries detailed below demonstrate a clear link between employee fitness programs and absenteeism, turnover and productivity.

A study carried out at Canada Life Assurance Company in Toronto showed a 22 percent reduction in absenteeism for employees participating regularly in the fitness program.

THE CANADA LIFE STUDY

A study carried out at Canada Life Assurance Company in Toronto showed a 22 percent reduction in absenteeism for employees participating regularly in the fitness program compared with both non-participants and employees of a similar company located nearby.[19]

The net result was a reduction in absenteeism of 1.3 days per participant annually, for a cost savings of about $100 for each employee. An examination of fitness improvement, absenteeism and job satisfaction showed a significant interaction of these variables. The net effect being both a reduced absentee profile through enhanced activity and a gain in job satisfaction.

The average cost of hiring and training a new employee was estimated to be $6,250 (expressed in 1980 dollars). Applying this figure to company records, the savings would be approximately $301 per employee-year.

Larger economic gains were realized from a reduction in employee turnover. Program adherents had less turnover than both non-participants and dropouts, the respective rates being 15 and 1.5 percent for a 10-month period. The average cost of hiring and training a new employee was estimated to be $6,250 (expressed in 1980 dollars). Applying this figure to company records, the savings would be approximately $301 per employee-year.

Productivity also showed a seven percent gain at Canada Life compared with four percent at the company used as a control group for comparison purposes.

THE ESSO PLAZA FITNESS PROJECT

Absenteeism data was collected between 1980 and 1984 for fitness centre members at ESSO Resources in Calgary. Results showed that participation in aerobic fitness and strength training activities related significantly to a reduction in absence from work. Furthermore, as attendance at the fitness centre increased, days absent from work decreased.[20]

Employees of Esso Resources during a noon-hour aerobics class; Calgary, Alberta

Although some self-selection in this data may be evident (those who became the most active had previous records of low absenteeism), these same employees reduced their rate of absenteeism even further within the first year of the fitness centre's operation. Moreover, there may be a tendency for employees who are highly motivated to join a company which offers such a program. This may be a positive finding since self-motivation is highly related to job attitude and above-average performance.

THE ALCAN EXPERIENCE

While most employee fitness studies have been done with white-collar workers, the program at Alcan Smelters and Chemicals Ltd. in Jonquiere, Quebec, shows that the same benefits can accrue to companies in the industrial sector.[21]

In 1981, Alcan launched a comprehensive fitness and lifestyle program for its 7,000 employees. Significant reductions in absenteeism have been realized for employees participating in all phases of the program. There was a 23 percent reduction after the first year for those in group programs and a 27 percent decrease for those following individual routines.

Absenteeism was decreased from 16.9 days per employee-year to 4.7, for a reduction of 72 percent. The program realized a savings of more than $64,000.

The most dramatic results have been realized, however, among participants in the "Back Smart" program. Seventy hourly employees with previous incidence of back problems took part in a special six-month program focusing on back care. The program included individual counselling, workshops, demonstrations and specific back exercises. In this group, absenteeism was decreased from 16.9 days per employee-year to 4.7, for a reduction of 72 percent. The program realized a savings of more than $64,000 in the year it was instituted, with additional savings to accrue in subsequent years due to healthier, more fit employees.

RECENT AMERICAN STUDIES

In the Tenneco program in Houston, Texas, 3,231 employees were evaluated for their attendance in an exercise program and corresponding job-performance ratings. Results of the study showed that employees having an average to above average job-performance rating were also likely to be adhering to the fitness program on a regular basis. This relationship was particularly strong among professional staff and clerical employees. A two-year followup showed less absenteeism among those who regularly attended the first fitness program.[22]

A 14-year longitudinal study, involving 1,800 fire fighters, was conducted by the Los Angeles Occupational Health Service. Goals of that program were to improve the fitness profiles of participants, reduce the risks associated with less-than-prudent lifestyles, and reduce compensation for cardiovascular illness. Results showed a 16 percent increase in physical fitness measures, an increase in the number of nonsmokers, a significant decrease in disabling injuries, and a 25 percent reduction in workers' compensation costs.[23]

Mesa Petroleum in Amarillo, Texas, evaluated absenteeism and medical costs following the initiation of an employee fitness program. The annual company medical costs for non-participating employees was found to be $260 higher than for those who took part in the program. Program participants also proved to have lower rates of absenteeism — on average, they missed two days less work each year.[24]

Major medical costs showed a 46 percent reduction among participants — or $262 per person.

In the Prudential Life program in Houston, both major medical costs and disability costs were examined over a five-year period. In this study, a 20 percent reduction in disability days was realized by employees adhering to the fitness program. The direct cost savings of this reduction averaged $91 per participant. Indirect costs — productivity loss, organizational disruption, retraining costs, etc. — were estimated to be three to six times that of direct costs. Major medical costs showed a 46 percent reduction among participants — or $262 per person. Interestingly, this study found that the higher the level of cardiorespiratory fitness of participants, the lower their average medical cost to the company.[25]

Additional information on programs at U.S. companies is included in Chapter 8.

MEASURING COST-EFFECTIVENESS

Two major problems exist when attempting to evaluate the return on investment in a corporate fitness program. The first difficulty is identifying both the appropriateness and measurability of factors to include in the cost-benefit analysis.

The second problem is the application of a short-term appraisal of factors which need long-term evaluation. Business data suggests that most new programs introduced into a company take three or more years to show cost-effectiveness. Thus, corporations may want to look at effectiveness measures in the short, intermediate and long-term.

The variety of factors that can be incorporated into a cost-benefit analysis are shown in Figure 1. Not all factors apply in all cases and some are difficult to quantify. Nevertheless, companies wishing to evaluate the cost-effectiveness of a fitness

program should be sure measures are put in place to collect the necessary information.

Absenteeism and staff turnover are easily measured. For absenteeism, a dollar value can be determined by taking the average daily cost of an absent employee (at 1.75 × daily wage) and multiplying that figure by the number of days absenteeism is changed. In the case of turnover, cost of training a new employee must be calculated.

Figure 1

Employee Fitness Program: Cost-Benefit Analysis

Benefits (Revenues or Savings):

annual membership fees;
reduced absenteeism;
decreased turnover;
reduced accidents;
reduced medical costs;
increased employee morale;
improved supervisor/worker relations;
enhanced company image.

Costs:

capital amortization (i.e., facility construction or renovation, equipment purchase);
operating costs (i.e., professional leadership, fitness assessments, program supplies and awards, possible lease or rental costs, and maintenance/janitorial services).

Additional aspects of absenteeism — although ones which are difficult to quantify — include loss of productivity, cost of inexperienced replacement employees, missed deadlines, and cancelled meetings.

Fit, healthy employees tend to use occupational health services less often and spend less on both prescription and non-prescription drugs.

Other benefits resulting from an employee fitness program include increased employee morale, improved supervisor/worker relations, and an image of the company as being both progressive and caring. These three factors are more difficult to measure in monetary terms, but all have been documented in recent research. With respect to medical costs, fit, healthy employees tend to use occupational health services less often and spend less on both prescription and non-prescription drugs.

The costs involved in establishing a program will vary depending on the facilities and services offered. These are also shown in Figure 1, with a variety of items listed under the two main headings of capital and operating costs.

Despite the capital costs involved, an on-site activity program is generally considered to be the most cost-effective. The advantages of a program at the work site (compared with programs using community facilities) include:

- savings in time and transportation costs;
- established avenues for program promotion;
- convenience, leading to higher program adherence;
- enhanced opportunities for targeting specific employee groups (less active, blue-collar workers, overweight employees, etc.);
- opportunities for peer-group reinforcement for lifestyle change.

(More information on the benefits of "in-house" programs is included in Chapter 9.)

Figure 2 shows the cost-benefit profile for the Canada Life program mentioned earlier in the chapter. On the benefit side of the picture, a total of $352,500 was realized annually when employee membership fees, reduced absenteeism, and turnover costs were considered. Program costs totalled $104,000 with the capital costs depreciated over a five-year period. Capital costs for the renovation included such items as general construction, plumbing, painting, lockers, carpeting and furnishings.

Figure 2

Canada Life Fitness Program: Cost-Benefit Profile

Benefits (Revenue and Savings)	
Membership fees	$ 37,500
Absenteeism reduction	90,000
Turnover decrease	225,000
	$ 352,500
Costs (Annual)	
Depreciated capital cost	$ 54,000
Operating expenses	50,000
	$ 104,000
Net Benefit	$ 248,500
Number of participants: 500	
Net benefit per participant	$497
Number of employees: 1,400	
Net benefit per employee	$177

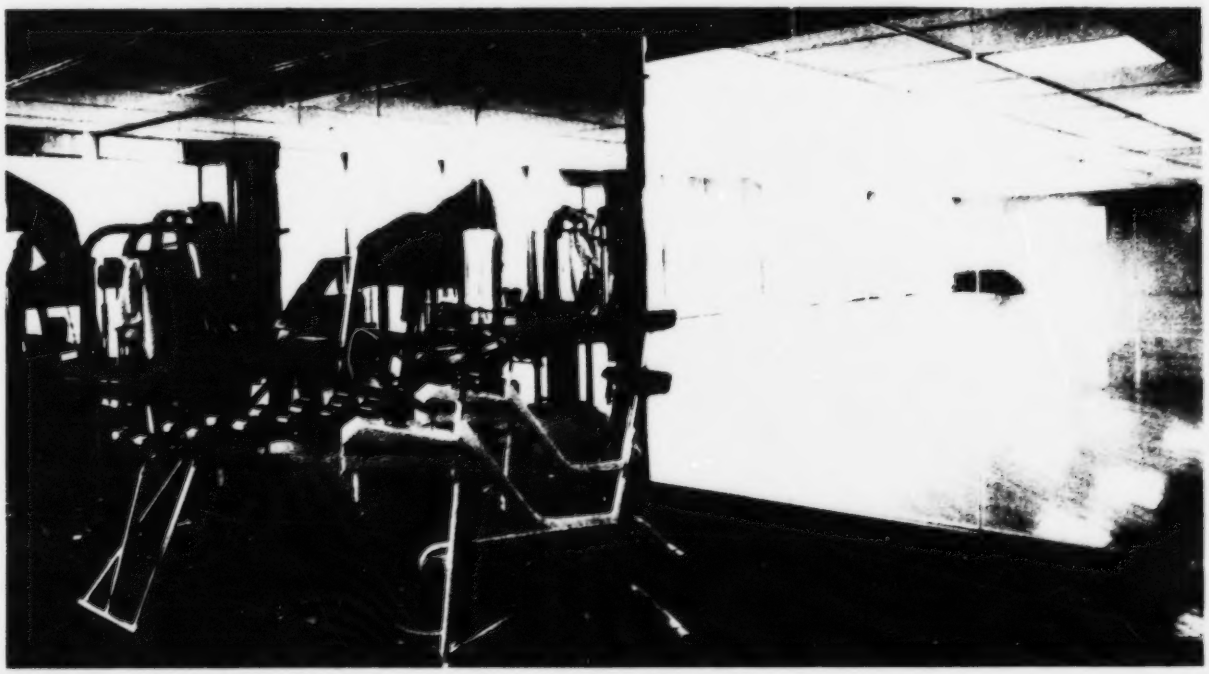
Annual *net* benefit (benefits minus costs) was $248,500. With a program membership of 500, from an employee population of 1,400, it's a simple matter to calculate the costs and benefits per program participant and per employee. Figure 2 notes the net benefits per participant and for the company as a whole.

The costs and benefits of employee fitness programs can be looked at in a number of ways. Some specialists in the field suggest, for example, that one less heart attack a year within an executive group underwrites the cost of the program for the entire group.

"Implementation of a fitness program by a company is not an overhead expense but rather an investment in improved morale, attitude and health of employees."

Arthur Collver, president of Crossley Karastan Carpet Mills Ltd. of Truro, Nova Scotia, reflecting on several years of experience with an on-site program in his own company, says quite simply: "Implementation of a fitness program by a company is not an overhead expense but rather an investment in improved morale, attitude and health of employees."

While there is still much research and evaluation to be done, the case for employee fitness programs is a strong one. Weighing the relative costs and benefits, the question may not be whether a corporation can afford a program, but whether it can afford not to have one.

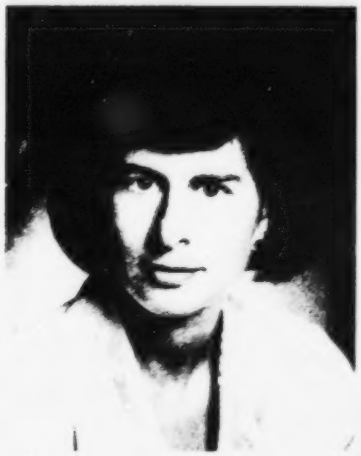


The McFitness Centre, McDonalds Restaurants of Canada Ltd.; Don Mills, Ontario

CHAPTER 4

LEADERSHIP

VERONICA MARSDEN



The delivery of physical activity programs, whether they are recreational activities in the community setting or fitness efforts at the workplace, depends on a number of factors including facilities and equipment, management and administration, promotion, and program leadership. While all these factors contribute to the cause, quality leadership is crucial.

"The key to a successful fitness centre lies in the quality of its personnel."

A Province of Manitoba study conducted some years ago noted that "the success of recreation services depends more on the quality of leadership than on any other single factor."[1] The federal government publication, *Guidelines for Fitness Centres and Health Clubs*, concurs, saying: "The *key* to a successful fitness centre lies in the quality of its personnel."[2]

Quality leadership is no less important in the employee fitness setting. Without good leadership, the best equipped programs will fail; with good leadership, a program lacking many desirable material features can still be a success.

This chapter considers four possible approaches to fitness leadership: a) contract fitness leaders; b) the provision of services by other agencies or organizations; c) the use of private fitness consultants; and d) the employment of in-house professional staff. The best approach will vary from company to company, depending on several factors, including:

- size of the company;
- financial resources committed to the program;
- in-house resources available (i.e., occupational health nurse, recreation consultant, etc.);
- the variety and number of programs to be offered;
- the presence of a fitness centre requiring supervision.

Very modest programs could rely on contract fitness leaders or other organizations and agencies to deliver services. Beyond this, a company would be wise to draw on the expertise of a private fitness consultant or consider hiring their own in-house professional. In all cases, professional leadership could be provided on either a part-time or full-time basis.

These four approaches to leadership are examined below. Following this, the important roles played by volunteer leaders and fitness advisory committees are considered.

Veronica Marsden, B.Sc.
Veronica Marsden is a partner in TRI FIT Incorporated, A Toronto-based company specializing in the design, implementation and management of fitness and health promotion programs. She has managed programs for the Canada Life and North American Life Assurance Companies, Xerox Canada and Northern Telecom. She has also travelled extensively across Canada conducting workshops and seminars for fitness leaders.

APPROACHES TO FITNESS LEADERSHIP

a) Contract Fitness Leaders

Although the provision of fitness classes does not constitute a comprehensive employee wellness program, an estimated one-third of Canadian firms with fitness programs, including the Ontario Ministry of Transport and Communications in Toronto, have responded to employee interest by hiring contract leaders to teach exercise classes on-site.[3] (in addition to classes, fitness leaders can administer some of the educational programs outlined in Chapter 6)

Contract leaders can be secured by contacting your provincial government department responsible for fitness, universities or colleges in your area, your local YM or YWCA, or private fitness clubs.

When hiring a leader on this basis, you should look for someone exuding a positive image of health and fitness who has provincial or national fitness leadership training as well as qualifications

in cardio-pulmonary resuscitation (CPR) and first-aid. In addition, they should possess good communications skills, be enthusiastic and creative, and have a good sense of humour.

A modest beginning with a contract leader teaching classes on-site a few times-a-week is one way of gauging the level of interest among employees and showing how the program should develop. As the program grows the need for more advanced methods of staffing will grow with it.

b) Agencies and Organizations

An estimated 20 percent of employee fitness programs are managed on a contract basis by YM and YWCAs, athletic and recreation departments of universities and colleges, community recreation centres and private clubs.[4] Services most often provided by these organizations include:

- fitness leaders to conduct fitness classes;
- on-site fitness assessments;
- workshops and seminars;
- leadership training for (employee) volunteer leaders;
- space and leadership for off-site programs.

When hiring an agency or organization — or a private consultant as discussed in the next section — care must be taken to select the right one. Figure 1 offers some help for decision-makers — things to look for and questions to ask:

Figure 1

Program Leadership

Choosing an Agency, Organization, or Consultant

Research their track record:

How long have they been in business?
What is the longest-running program they manage?
What are participation rates in their various programs?

A mature program should have an employee participation rate of 25 to 35 percent. Canada Life Assurance Company in Toronto and ESSO Resources in Calgary have participation rates of over 40 percent.

Have they worked with companies similar to yours?

Designing a program for production-line workers is quite different than programming for a white-collar group.

Explore staff procedures:

What type of staff do they generally hire? Are they graduates in physical education, kinesiology, or a related field?

With so many people jumping on the fitness bandwagon and proclaiming themselves as experts in the field, it's sometimes difficult to determine who is qualified and who is not.

Do staff have experience in a corporate setting?
How is contact maintained with their staff? Is there direct supervision or are staff generally left on their own?

Finally, before hiring an agency, organization or consultant to administer your fitness programs and services, visit as many of their programs as you can and talk to employers who have used their services.

c) Private Fitness Consultants

The Canadian Chamber of Commerce estimates that private consultants provide program management in five percent and day-to-day leadership in 14 percent of employee fitness programs within Canadian business and industry.

As the corporate fitness boom matures, the number of private fitness consultants and consulting companies is on the increase. The Canadian Chamber of Commerce estimates that private consultants provide program management in five percent and day-to-day leadership in 14 percent of employee fitness programs within Canadian business and industry.[5] There are now a number of consulting firms which specialize in the design, implementation and management of corporate fitness and health enhancement programs. The services these companies can provide include:

- presentations to senior management to sell them on the concept of employee fitness;
- design and analysis of employee needs surveys;
- program consultation;
- fitness centre design;
- selection of exercise equipment;
- hiring, training, and supervision of program staff.

Even though the initial costs associated with hiring a consulting firm may seem high, it can be well worth it if it gets the program off to a good start. It is very difficult to salvage a program that "missed the mark" the first time around.

There are a number of advantages to hiring a competent consultant to design and manage your

program. These include:

- expertise in the field of corporate fitness and health promotion;
- experience in integrating fitness programs into the existing organizational structure of a company;
- the availability of program coordinators to manage programs;
- on-going training and supervision of program staff.

d) In-House Professional Staff

An estimated 15 percent of programs are coordinated by a staff fitness director.

Whether it be on a part-time or full-time basis, some companies such as Manufacturers Life and CrownLife, in Toronto, prefer to hire their own staff rather than use contract personnel. An estimated 15 percent of programs are coordinated by a staff fitness director.[6] This situation can work well if you find an individual with the appropriate blend of academic qualifications and related work experience, along with a personality that fits well with the organization.

Hiring a fitness director is a complex task. Just as it is important to select a car that suits your budget and lifestyle, it is important to choose a director who can address your program needs and who will fit in well as an employee. Figure 2 outlines what to look for when hiring a fitness director. (these same characteristics are important in a program coordinator provided by a private consulting firm)

Figure 2

Qualities and Qualifications of a Fitness Director

Educational Background

At least an undergraduate degree in physical education, kinesiology or a related field *or* a diploma in fitness leadership from a community college. Training should also include current certification in CPR and first-aid.

Management Skills

Organizational skills to handle a program budget, supervise volunteer and part-time or full-time staff and coordinate volunteer committees.

Exercise Leadership

Practical experience in leading different kinds of exercise classes is important as is experience in the training of leaders. A background in exercise testing is also important, including accreditation with the Canadian Association of Sport Sciences (CASS). Details of the CASS program are noted in Appendix 1.

Counselling Skills

This includes a knowledge of behaviour modification and adult learning principles and the ability to discuss technical information in a scientific yet straightforward manner.

Administrative Skills

This includes a knowledge of issues that relate to overall health and the ability to administer programs in nutrition education, weight control, smoking cessation, back-care, and stress management. Even though most directors will not have sufficient knowledge and skills to lead all of these programs themselves, and may require additional resource persons, an interest in and basic knowledge of these areas is important.

Marketing Skills

Programs must be marketed effectively if employees are to participate. Particularly important is a demonstrated ability to market fitness to inactive people.

Computer Knowledge

With more and more fitness centres computerizing their program records, a basic knowledge of computers is a definite asset.

Personal Attributes

Strong interpersonal skills and the ability to motivate are crucial. The director should also be enthusiastic and creative, possess a good sense of humour, and exemplify the lifestyle he or she recommends.

The fitness director is, without question, a jack-of-all-trades and a wearer of many hats. While the details in Figure 2 give an idea of a director's responsibilities and challenges, the following list provides a more complete picture of the requirements of the job. (the *actual* requirements will vary from one organization to the next, depending on whether the job is part- or full-time and whether additional staff members are available)

A Shell Canada employee receives instruction from the Fitness Director; Calgary, Alberta

LEADERSHIP RESPONSIBILITIES

- Initiate contact with all new employees, including sending welcome cards, meeting with them to discuss the program, and providing on-going guidance and follow-up.
- Conduct fitness appraisals and counselling with all new employees registering in the program.
- Counsel employees requiring guidance in the areas of fitness, nutrition, weight loss, back-care and sports-injury rehabilitation.
- Chair runners-club committee meetings and organize fun runs, workshops and other special events relating to running.
- Instruct a minimum of one to two fitness classes per week.
- Train new fitness instructors as required.
- Conduct exercise breaks for in-house meetings, workshops, and courses.

ADMINISTRATIVE RESPONSIBILITIES

- Follow up regularly on potential program drop-outs.
- Prepare monthly employee and fitness instructor newsletters.
- Work with the health services department in the development of special programs relating to blood pressure control, back-care, weight control and stress management.
- Coordinate program registration days and fitness sale events.
- Maintain accurate program statistics.
- Budget planning and management.
- Write promotional bulletins as required.
- Supervise maintenance and repair of fitness centre equipment and general upkeep of the facility.
- Research new resource materials and current information in the field. Keep up-to-date files on all new information.
- Conduct a comprehensive annual program evaluation.

PROGRAM PROMOTION

- Design, promote and coordinate all special events.
- Organize all major activity challenges between departments and/or other companies.
- Be available to talk with outside visitors requesting information on the fitness program.
- Be responsible for the upkeep of bulletin boards to ensure interesting and attractively displayed materials.

Contacts for finding suitable job applicants are the same as those noted above for searching out contract leaders, (i.e., provincial government departments responsible for fitness, universities or colleges, and YM and YWCAs). It may also be appropriate to solicit applications through the careers section in selected newspapers. While the details of the job may be different, the accompanying sample advertisement gives an idea of how it might read.

Texaco employees at the start of the Texaco Mile; Don Mills, Ontario

Figure 3

Careers

Fitness Director

The ABC Company, located in downtown Vancouver, is seeking an individual to design, implement and coordinate a fitness program for an employee population of 700, including a production-line staff of 500.

The ideal candidate will have three to four years related experience in the planning of wellness programs, preferably in a corporate setting, and a degree in physical education, kinesiology or related field. Preference will be given to persons with national or provincial certification in exercise leadership and testing.

This high-energy position demands superior "on-the-floor" leadership and administrative/supervisory skills, good interpersonal and communication skills, knowledge of behaviour modification strategies, and the technical expertise required to assist individuals in selecting appropriate lifestyle choices.

Salary will be commensurate with experience and qualifications and will include a company-paid employee benefits program. Interested candidates should forward resumés to: Director of Personnel, The ABC Company, P.O. Box 000, Vancouver, British Columbia, V0V 0V0.

VOLUNTEER ACTIVITY LEADERS

Over one in five corporate fitness programs rely on volunteer activity leaders.

Over one in five corporate fitness programs rely on volunteer activity leaders.[7] Companies such as Mobil Oil in Calgary and Xerox Research Centre of Canada in Mississauga benefit from employee volunteers who enthusiastically deliver quality fitness programs.

There are a number of advantages to having employees serve as volunteer leaders:

- Many volunteers notice that the leadership skills they develop as fitness instructors enhance their job performance. (several leaders have gone so far as to claim that their new-found skills resulted in faster job promotion!)
- Because volunteer leaders usually work in di-

verse areas of the company, they form a natural marketing network to promote the program.
- Participant feedback is easier to facilitate with employee-led programs.
- In-house leadership increases a sense of employee ownership and pride in the program. This has been shown to have a positive spill-over effect on how employees feel about their company.
- Although there are costs involved in adequately training and motivating volunteers, this approach can be cost-effective.

For a program to run successfully with the assistance of volunteers, they must be carefully selected and properly trained. The fitness director will have to spend considerable time in the on-going training and supervision of these leaders for them to be effective.

Just as it is important to adequately train volunteers, the director should look at ways to keep them challenged and interested. Motivational strategies that have been used successfully in other companies include:

- uniforms;
- time off work to teach;
- a special display of instructors' photos in the fitness centre;
- highlighting instructors in monthly newsletters;
- a special thank-you luncheon;
- a certificate of recognition/appreciation signed by the company president;
- company subsidization for participation in community-organized professional development opportunities;
- an annual training retreat.

Teaching exercise classes is both an art and a science.

Teaching exercise classes is both an art and a science. The knowledge and practice required to perfect these skills takes time to develop. Many companies have hired experienced contract leaders to help get a program off the ground until volunteers were ready to take over. Starting this way gives volunteers an opportunity to apprentice with an experienced leader.

Along with an apprenticeship program, there are other options for training volunteer leaders. For a larger company requiring a considerable number of leaders, an in-house training program may be best. A smaller company which may only be training a few leaders could band together with another company to run a course or send potential volunteers to a recognized course in the community. Such courses are taught by YMCAs and YWCAs, some community recreation departments, colleges and universities and private groups.

A "cooling-off" class for Chevron employees; Chevron Canada Resources Ltd., Calgary, Alberta

FITNESS ADVISORY COMMITTEE

Sun Life, in Toronto, Shell Canada, in Calgary, and Alcan, in Jonquiere, Quebec are just a few of the 11 percent of companies that rely on the expert guidance of an employee advisory committee to ensure that programs focus on the needs and interests of the employee population.[8] To ensure the committee works effectively, there should be representation from a wide cross-section of employees, including decision-makers. Without influential management representation, your program is likely to be low profile.

Figure 4 shows the typical representation on an advisory committee in a larger company. Because of the contact volunteer leaders have with participants, it may be wise to have their representation on the committee as well.

Figure 4

Fitness Advisory Committee Representatives

marketing	union or employee representative
human resources	office services, (i.e., building manager)
finance	occupational health
data processing	special interest groups
senior management	production or manufacturing

At the outset of the program, it is important to clearly define the role of the committee. In some cases, it may be a decision-making body with complete control over the program budget, while other groups may work more in an advisory capacity. Whatever its role, members should play a part in developing a program mission with goals and objectives.

Depending on the diversity of the program and the extent of on-site professional leadership, the development of sub-committees may be appropriate. In some companies, these groups are instrumental in coordinating such things as:

- fun runs;
- fund-raising projects;
- special events (fitness festivals, summer fit-niks, clinics, etc.);
- recreational leagues.

As with volunteer leaders, it is important to recognize advisory-committee members for the important role they play in the program. Some of the motivational efforts noted above for volunteer leaders are equally appropriate as a means of reward for committee members.

INTEGRATION WITH OTHER COMPANY PROGRAMS

In large companies it makes good sense to coordinate the efforts of the fitness program with those of other company programs or departments. ESSO Resources Canada Ltd., headquarters in Calgary, offers an excellent example of a multidisciplinary approach to implementing a Fitness and Lifestyle program.

The fitness coordinator, an occupational health nurse, and the employee assistance program consultant work together to deliver a comprehensive fitness and health education program to its 2000 head-office employees.

Figure 5 shows the operating plan for the program at ESSO. Adopting this team approach to wellness ensures that employee fitness is integrated into a complete program of health care.

Figure 5

ESSO Resources Canada Ltd.

A Multi-Disciplinary Approach to Employee Health and Fitness

Program Sharing Areas

Occupational Health Nurse and Fitness Coordinator responsible for:

- CPR and first-aid courses;
- blood pressure screening;
- high risk fitness assessments;
- smoking cessation programs;
- cardiovascular risk education;
- health resource centre;
- *Health* newsletter;
- weight management.

Employee Assistance Consultant and Fitness Coordinator responsible for:

- stress management programs;
- individual counselling (referrals);
- health resource centre (input);
- *Health* newsletter (input).

Fitness Coordinator responsible for:

- fitness classes and individual exercise prescription;
- incentive contests (individual and team);
- nutrition/weight loss education aimed at the entire employee group;
- fitness assessments;
- cafeteria promotions;
- runners/walkers club coordination.

With the number of companies recognizing the benefits of a healthy and fit workforce, there is an increasing need for fitness professionals to work in the employee setting.

With the number of companies recognizing the benefits of a healthy and fit workforce, there is an increasing need for fitness professionals to work in the employee setting. This, in turn, requires physical education graduates who have training in both the business and technical aspects of managing adult fitness programs. If the corporate sector is to be adequately served, programs are needed to train those who can work effectively in this exciting and growing area of employee fitness.

CHAPTER 5

RECRUITMENT AND RETENTION

ROY J. SHEPHARD AND MICHAEL H. COX

The employee fitness literature often discusses program compliance and adherence, terms which are familiar to researchers and to readers of medical journals. If a doctor prescribes a medication for high blood pressure, almost all patients will try the medicine (initial compliance), although a much smaller proportion of individuals will continue with treatment on a long-term basis (adherence). In this case, initial compliance is good, but adherence to the therapy is poor.

In the context of an employee fitness program, the two important questions are not dissimilar to the taking of medicine:

1. How do you get people to start? (initial compliance *or* recruitment)
2. Once started, how do you keep them involved? (adherence *or* retention)

With more than 30,000 employee fitness programs in North America [1], one would expect that we'd have some clear answers to these questions. But there are no easy answers. To gain these insights, extensive and costly research programs would need to be mounted. Even if this research revealed some trends, it would be difficult to generalize from one worksite to another.

When looking at data relating to participation rates in employee fitness programs, the following questions must be asked:

- How many people does the company employ?
- Is the corporate culture positively disposed toward health and fitness?
- What is the make-up of the work force? White collar, blue collar? Male, female?
- What fitness facilities are available? Are they on-site?
- What fitness programs are offered? Is there adequate fitness leadership?
- Is there a cost to participation? A reward system?
- Do employees have flexibility in their working hours to attend a fitness program?
- How many hours is the fitness facility open?
- Can spouses and other family members use the program?
- Is the fitness program a part of an overall company health and lifestyle initiative?
- Is the program located in a downtown area or in the suburbs?
- Does the climate allow outdoor exercise?

When analyzing reports of the percentage of employees joining, or staying with, a program, it is important to examine how that program is structured. It is clear that a one-dimensional program cannot service a whole work force and that people who begin a program will not always remain with it. It is also clear that a well-structured fitness program can make a powerful impact on the corporate culture and can attract enough of the work force that measurable benefits occur to the employer *and* the employee-participant.

PERCEIVED BARRIERS TO INITIAL PARTICIPATION

The 1981 Canada Fitness Survey (CFS) detailed the perceived barriers to participation in fitness programs.[2] The usual responses included lack of time; conflicts with work; lack of child care; inconvenience or inaccessibility; and lack of equipment, facilities and programs. If these are the obstacles, a well-designed employee fitness program can help overcome them.

Less commonly mentioned barriers to participation noted in the CFS include cost, laziness, and lack of a partner or colleague. No program can, of itself, make people less lazy, but it can provide exercise opportunities at a reasonable cost.

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It is not clear if the responses to the CFS reflect *real* barriers to participation or whether they are simply excuses.[3,4] The CFS and the Perrier Study [5], for example, both found active exercisers complaining as much as non-exercisers about program accessibility. Likewise, the CFS found that inactive individuals had as much, or more, leisure time than those who are physically active.

Recruiting employees to join programs requires a two-fold thrust. The first is to design a high quality, accessible, reasonably-priced fitness program. The second is to facilitate access to the program. If the barriers to participation are perceived, rather than real, then people's perceptions must be addressed. To get a "foot-in-the-door" and get employees to join an exercise program, you may have to educate them, motivate them, and work with them on skills such as time management.

Although specific recruitment techniques to enrol people in employee fitness programs have not been studied, several authors have suggested some techniques for maximizing initial participation. [6,7,8] These are detailed in Figure 1.

Figure 1

Key Points of Promotion and Recruitment

Promotion should:

- be diverse, varied and frequent;
- have corporate mandate and support initially and throughout the program;
- have special approaches for certain employee groups (smokers, older employees, etc.);
- focus on goals and benefits of the program.

Planned corporate support and appropriate pre-program publicity may motivate even the less physically fit employees to enrol.

High failure rates have been experienced in U.S. industrial fitness programs that did not educate employees and did nothing to improve health and safety conditions within the work environment. Generally, such programs lack corporate commitment; they sustain an "organizational culture filled with negative health norms which override whatever changes individuals try to make."[9] On the other hand, planned corporate support and appropriate pre-program publicity may motivate even the less physically fit employees to enrol.[10]

A program "not busy being born is busy dying." Like any other corporate initiative, an employee fitness and wellness program needs constant stimulation. Following are some suggested promotional tools to support programming efforts:

- special fitness appraisal days;
- articles in company newsletters;
- referrals from occupational health physicians;
- special events and theme campaigns;
- other company health initiatives.

If facilities are constructed on-site, they should be visible and high profile. The days are gone when fitness was hidden away in the basement. Fitness facilities are good for the corporate image and they may even help to attract high-achieving employees to a company.

RETENTION — LONG-TERM PROGRAM ADHERENCE

The best way to keep participants motivated and involved is to offer a high quality, stimulating program. Leadership plays a powerful role here. By being sensitive to participants' reasons for exercising, leaders can structure programs which have a chance of living up to their expectations. If fun is important, try to provide some fun. If employees are interested in decreasing body fat, provide information and counselling about diet to complement physical activity classes. Similarly, a link can be established between exercise and stress reduction for those employees looking for ways to cope with stress.

Table 1 outlines the major reasons why people are active as reported by the Canada Fitness Survey. Leaders should use this information to good advantage in both their recruitment and their retention strategies.

Table 1

Reasons to be Active

Reason	*% of Men*	*% of Women*
Feel better	58	62
Fun/excitement	44	43
Control weight	33	51
Flexibility	37	43
Stress control	31	36
Companionship	21	27
Physician's advice	20	25
Challenge	23	19
Learning	18	21
Fitness leader's advice	17	21

Identifying problems which might cause people to drop out of a program and providing solutions to these problems can go a long way toward reducing the drop-out rate. Listed below are some typical problems:

- participants suffer from stiff muscles or injuries;
- people are intimidated by the "young jock" image of fitness classes;
- fitness activities take time away from family life;
- activities are inappropriate in type and intensity for some participants;
- no one seems to care if people miss classes;
- it's hard to see improvement;
- individuals go to class but still don't lose weight;
- the cost of clothing and equipment is too high;
- the change facilities are poorly maintained and unattractive.

There are solutions to all the above problems — solutions which are daily in evidence in Canadian programs. Participants are tested and retested, and a smorgasbord of activities are offered to suit many tastes and types. Spouses and families are involved, and program times are arranged to accommodate personal schedules and responsibilities. Each problem gives birth to a solution, and the solutions enhance the quality and universal appeal of the program. Figure 2 highlights some of the goals which programs should seek to develop.

Figure 2

Program Goals

Programs should develop:

- credibility, by linking with pertinent corporate departments;
- supplemental, on-going promotion and lifestyle education programs to increase awareness and understanding;
- frequent feedback and recognition of achievements and successes;
- special publicity for the health-related components of fitness, (e.g., heart-lung fitness, weight control, back fitness and stress reduction);
- a number of gentle and progressive programs to encourage certain employee groups (the overweight, older, sedentary employees, those with low-back problems, etc.);
- short-term goals and specific objectives, reinforced with timely evaluation;
- opportunities for spouses and "significant others" whenever possible.

Reward systems are helpful short-term motivators until the activity itself and positive feelings about it become their own reward.

Vancouver City Savings Credit Union offers an example of a unique reward system for its employees. The VanCity Fitness Incentive Program was introduced in the belief that healthy people are more productive. To ensure participation from the majority of employees, the program was divided into three components: Fitness/Exercise; Fitness/Weight Loss; and Fitness/Smoking. Each component has several plateaus offering different incentives or rewards. The program works on the honour system, with each employee receiving a card which they maintain on their own.

Figure 3 details the program. It is administered on a yearly basis, with scores returning to zero on January 1 each year.

Figure 3

Vancouver City Savings Credit Union

Fitness Incentive Program

Fitness/Exercise

100 Miles	$50 cash.
300 Miles	Letter qualifying employee to receive a 10 percent discount plus a credit up to the amount of $50 toward a pair of jogging/court shoes at a specified sports store.
500 Miles	Employee is reimbursed up to $50 toward the cost of tickets or passes for sporting/theatre event of their choice.
750 Miles	Letter qualifying employee to receive a 10 percent discount plus a credit up to an amount of $50 toward any merchandise at a specified sports store.
1000 Miles	Dinner at a specified restaurant with other 1000-mile achievers, weight-loss achievers and successful nonsmokers.
1500 Miles	The employee receives a Sony Walkman headset.

Fitness/Weight Loss

25 Pounds	$50 cash.
50 Pounds	Employee joins the 1000-

	mile achievers and non-smokers for dinner at a specified restaurant.
6 Months	If the employee maintains the 25 or 50 pounds weight loss for six months, they receive a letter qualifying them to receive a 10 percent discount plus a credit of $50 toward a pair of jogging/court shoes or a training suit at a specified sports store.
12 Months	If the employee maintains the 25 or 50 pounds weight loss for 12 months, they are reimbursed up to $50 toward the cost of tickets or passes for sporting/theatre event of their choice.

Fitness/Smoking

3 Months	$50 cash.
6 Months	Letter qualifying employee to receive a 10 percent discount plus a credit up to an amount of $50 toward a pair of jogging/court shoes or a training suit at a specified sports store.
12 Months	Dinner at a specified restaurant with the 1000-mile achievers and the weight-loss achievers.

In the Fitness/Exercise component of the program, employees may choose from a variety of activities with all activities equated to jogging miles. (one hour of aerobics is equal to 3 miles; 45 minutes of racquetball is equal to 4 miles; 18 holes of golf is equal to 3 miles; and so on) To complement the Fitness/Smoking program, VanCity has also introduced a company nonsmoking policy.

Is the program successful? Very! Absenteeism has dropped, productivity levels have increased, and participants report an improved sense of well-being.

In 1986, there was a 70 percent participation rate in the program throughout VanCity's 19 branches — all this at a cost of $15,000 for the year.

In 1986, there was a 70 percent participation rate in the program throughout VanCity's 19 branches — all this at a cost of $15,000 for the year. For the company, the benefits far outweigh the costs, with the benefits being increased employee morale; a clean, healthy work environment; and increased productivity levels.

Employees exercise at the Kellogg's Health Promotion Program; London, Ontario

FEEDBACK AND EVALUATION

In the Manulife study many participants and subsequent drop-outs stated that exercise was less enjoyable than they had thought it would be.[11] This statement illustrates not only the need to accept employees' perceptions of exercise, but also the need for regular program evaluation.

Program evaluation by participants and fitness leaders should occur at consistent intervals. Participation rates, changes in fitness levels, and other positive behaviours should be documented regularly. Evaluation systems are important, not only for improving and upgrading program content, but in providing objective justification of program performance to company management.

Feedback to employees can take many forms. An individual can be rewarded by the results of a fitness assessment — perceived increases in physical fitness, for example, can lead to an enhanced sense of self-esteem. Achievable and easily understood targets can be set — a certain distance to be walked, a specified amount of weight to be lost — with simple rewards such as badges or T-shirts for those who are successful.

Participants can be asked to contract a specific performance, and they should be encouraged to keep a simple exercise "log." Another useful tactic

is for employees to complete a "decisional balance-sheet," writing down the perceived costs and benefits of continued participation in the program. Employees should also be encouraged to include regular activity in their normal working routine — by walking or cycling a part of the distance to work, for example.

Integration is one of the keys to a successful employee fitness program.

There is much to commend linkage of the fitness program with an overall plan of health and lifestyle education. But even if this is not done, the leader must have the knowledge to respond effectively to questions on health issues, using responses as a means of reinforcing the exercise habit.

Integration is one of the keys to a successful employee fitness program. The program should be seen as an integral part of the corporate culture. The fitness program should also be integrated with other aspects of positive lifestyling, so that fitness can be seen as part of the solution to attaining personal and professional potential.

Marketing is important and any fitness and lifestyle program must be marketed vigorously and constantly to encourage employees to get involved. Once there, good programs and strong leadership will keep them there. The "sizzle" of fitness will attract plenty of people, but only a good "steak" will keep them coming back for more.

CHAPTER 6

SPECIAL EMPLOYEE GROUPS

GORDON STEWART

The first edition of *Employee Fitness*, published in 1977, was launched on a positive and upbeat note with an introduction entitled "Employee Fitness: An Idea Whose Time Has Come." An apt theme for this chapter — dealing with special employee groups and written some 10 years later — is that employee fitness is such a good idea, it's time for it to come to more people.

Running a "head office" fitness program in an urban centre is a relatively easy matter. (easy to *do*, not so easy to *do well*) With a large employee population to serve, a fitness facility and professional staff can be justified. Add to this a captive audience of managers, administrators, professionals and clerical personnel — relatively motivated groups that would vote for working out over window shopping any day — and you have all the makings of a successful employee fitness program.

Other employee groups are not so easily reached, and, to this point, have not been well served by the employee fitness movement. These include:

- *Industrial and service sector employees.*
  Jobs in these categories range from porters and chambermaids to high-tech assembly-line tasks to heavy work in forestry, mining, or manufacturing. In all cases, at least *some* activity is required on the job (compared with the sedentary office workers noted above).
- *Employees in small-business establishments.*
  Jobs in this area can range from sedentary to very active; responsibilities cover the full spectrum from office management and administration to plant, security and janitorial personnel and equipment operators.
- *The geographically dispersed.*
  Included here are employees working in a small branch or plant of a larger operation as well as those working on their own out of a central office. The latter group includes individuals who get home every night, (e.g., taxi and bus drivers and sales people in an urban area) and those who are on the road for extended periods of time (long-distance truckers and regional sales representatives).

This chapter considers the characteristics and the special needs and interests of these three groups of employees. Pertinent workforce statistics are noted in the first section below. Following the statistics, the obstacles faced in reaching these special employee groups are examined along with some of the special opportunities they present. Finally, a smorgasbord of program options is provided as well as some examples of innovative and interesting programs now in operation across the country.

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WORKFORCE STATISTICS

Statistics Canada figures for 1985 put the size of the workforce at 11.3 million. Table 1 shows the portion of this total made up by industrial and service sector employees, as well as the percentage of men and women in each group.

Table 1

Workforce Statistics*

Industrial and Service Sector Employees

Group	*No. (in millions)*	*Percentage*	
		Men	Women
total workforce	11.30	58	42
industrial sector	3.62	85	15
service sector	1.56	46	54

* Devised from 1985 Statistics Canada information on size and makeup of the workforce.

In total, the industrial and service sectors — the first of our special groups noted above — employed 5.18 million people, or 46 percent of the total workforce.

It's more difficult to determine the number of employees fitting into the "geographically dispersed" category. A good percentage of those in sales would clearly fit into this group as would many employees who are also in the industrial/service sectors. In addition, a considerable number of people in sedentary office jobs would fall into this group if they are branch personnel of regional or national organizations.

With respect to small-business operations Table 2 shows the percentage of employees working in different sized business establishments.

Table 2

Private Sector Employment*

Size of Business by Number of Employees	*Percentage of Workforce Employed*
less than 5	13%
5 – 19	13
20 – 49	9
50 – 99	7
100 – 499	16
500 +	42
	100%

* Devised from 1984 Statistics Canada information on 8.93 million private-sector employees.

35 percent of the private-sector workforce is employed in businesses with less than 50 people.

Small business is a mainstay of the Canadian economy. As Table 2 shows, 35 percent of the private-sector workforce is employed in businesses with less than 50 people (42 percent in organizations with less than 100 employees). Comparison with 1978 statistics shows an increasing trend toward small business. Figures collected that year put 30 percent of the private-sector workforce in businesses of 50 or less and 38 percent in those with fewer than 100 employees.

Although it's not possible to combine these statistics to arrive at one figure, it is safe to say that a clear majority of the workforce (public and private) fall into *at least one* of the three special employee groups under consideration.

OBSTACLES AND OPPORTUNITIES

A survey carried out by the Canadian Public Health Association in 1981 identified the "perceived problems" of employers launching on-site fitness programs.[1] Their major concerns were physical constraints, finances, program scheduling, and motivation. (similar concerns were found in a study done in British Columbia in 1985 [2]) These will be considered at some length in the next section. Suffice it to say here, these problems are more *perceived* than *real* if a sensible and practical approach is taken in dealing with the particular needs and interests of various employee groups.

Employee fitness programers should capitalize on the perceived motives for physical activity.

Individuals, too, face obstacles in their efforts to be active. A number of these (reported by the Canada Fitness Survey [3]) were mentioned in Chapter 5. Similar sentiments were expressed in the Fitness Ontario study, *Those Who Know But Don't Do*.[4] Together, they found the major obstacles to be lack of time, lack of energy, and inadequate facilities or facilities too far away.

In addition to tackling the obstacles, employee fitness programers should capitalize on the perceived motives for physical activity. The Fitness Ontario study cited above found the following to be important:

- *Interest in self-improvement*
  The majority of people see physical activity as a good thing and believe they should get more exercise.
- *Social support and socializing opportunities*
  Strong social support from family, friends or coworkers helps. Meeting new people and the opportunity to socialize through physical activity are also important.
- *Enjoyment*
  Many people begin a program because it's good for them or it makes them feel better, but few stay with it over the long term unless it brings some enjoyment and continued satisfaction.
- *Information about health and fitness*
  In spite of the educational efforts over the years, some people are still unconvinced of the value of regular exercise, unaware of the relative benefits of various activities, or uncertain about how much exercise is enough.

Along with these general obstacles and opportunities, the particular characteristics, needs and interests of special employee groups must be considered if programs designed for them are to be beneficial and effective.

INDUSTRIAL AND SERVICE SECTOR EMPLOYEES

The Fitness Ontario report, *Work Site Labour Fitness* [5], provides a clear profile of industrial and service sector employees (the so-called blue-collar worker). This study reinforces some of the concerns and misconceptions discussed above.

Among the majority of blue-collar women, the most popular planned fitness activities are calisthenics and aerobic dance classes.

Research on this employee group shows that:

- they are less involved in physical activity on a regular basis than other groups;
- many of them don't know what constitutes "fitness";
- some think that the manual work they do makes them fit;
- others are satisfied with their present level of activity, despite being unfit by any standard and virtually inactive outside of work.

Their obstacles to exercise are the same as those listed earlier — lack of time and energy — plus two notable additions.

- *Money*
  Faced with the possibility of unpredictable layoffs or seasonal work, many are reluctant to make long-term investments in all but the "essentials."
- *Perception of fitness*
  Many view fitness programs as something done "by management, for management." Blue-collar men tend to favour sports and recreational programs over the more traditional fitness activities. Among the majority of blue-collar women, the most popular planned fitness activities are calisthetics and aerobic dance classes.

The work structure also makes fitness programing more difficult. Shift work, short lunch breaks, long work days, and the possibility of lengthy travel time to and from work (sometimes in company vehicles on strict schedules) means that lunchtime and after-work programs or any kind of regular scheduling are almost out of the question.

Flexible scheduling and good use of activities and programs in the community can help overcome these problems. Successful educational efforts will get some of the employees in this group involved in the more traditional (and beneficial) fitness activities. Improved fitness among employees can, in turn, lead to fewer errors and omissions during repetitive, assembly-line tasks and a reduced risk of injuries and accidents in all kinds of manual work.

Employees at the Waterton Gas Plant participate in a fitness break; Pincher Creek, Alberta

EMPLOYEES IN SMALL-BUSINESS ESTABLISHMENTS

Small businesses employing blue-collar workers face the obstacles and opportunities just discussed. The work schedules and interests of other employees and the total size of the work force must also be taken into account when devising a program plan. Some factors to consider are outlined in the *Program Options* section which follows.

THE GEOGRAPHICALLY DISPERSED

Branch offices and plants with few employees are in the same position as small-business establishments — they lack the economies of scale available to larger companies. Some, however, may be fortunate enough to have the resources of a head-office fitness program at their disposal.

The additional challenge here is to meet the needs of employees who are rarely on-site — those who work out of the office in one capacity or an-

other, be it a daytime courier delivery person or a travelling sales representative. Some ways to cater to their special circumstances are discussed below.

PROGRAM OPTIONS

While there are a number of ways to categorize program options, the *PSP Plan* provides a logical framework. Following the PSP* approach, organizations can choose to *promote, sponsor,* or *provide* fitness activities for employees.

Fitness is *promoted* through educational and motivational programs. *Sponsorship* comes when an organization covers some or all of the costs incurred by an employee when participating in programs away from the workplace. *Provision* means on-site facilities and programs. Moving along the promote-sponsor-provide spectrum, programs range from simple and inexpensive to complex and costly.

This isn't to suggest that organizations should take the promotion route and leave it at that. Indeed, quite the opposite may be most appropriate. While simple educational programs can play a part, experience has shown that the payback for employee fitness is somewhat proportional to the amount of money (wisely!) spent.

As noted in earlier chapters, lifestyle change is no easy task. An individual going from a sedentary lifestyle to one which includes regular physical activity passes through several stages. These stages include awareness, education, motivation, trial, reinforcement and regular activity. Promotional programs effectively deal with the awareness through trial stages, but only by repeated trials comes reinforcement of a habit leading to regular physical activity. Sponsorship or provision of on-site programs can help individuals through these crucial final stages.

Following are some thoughts on fitness promotion, sponsorship in outside activities, and provision of on-site facilities and programs along with some examples of programs now in place across the country. A more lengthy discussion of subsidy programs and on-site facilities/programs is included in Chapter 9.

* The PSP acronym is provided courtesy of Dr. David Chisholm, Manager, Occupational Health, Shell Canada Limited

FITNESS PROMOTION

Promotional programs can be tailored to meet the needs and interests of specific employee groups.

Promotional programs can be tailored to meet the needs and interests of specific employee groups and they can address some of the misconceptions about fitness outlined in the previous section. They are useful for any organization making tentative steps in the direction of employee fitness — a way to examine employee interest without a large initial commitment.

The programs outlined below require no special facilities, little cost, and modest organizational time. They are applicable in a wide range of workplace settings, and they can be organized by individuals with no prior experience in fitness. All it takes is a little time and effort and a commitment to the cause.

Poster Campaigns

Colourful, convincing posters are available from a variety of federal, provincial and private organizations. Place posters in high traffic areas like hallways, cafeterias and elevators. Mixing things up is important, too, so change and rotate them regularly. Don't leave them in one spot until they fade or fall down.

Health and Fitness Library

A complete health and fitness library includes brochures, articles, booklets and books. To get the most from your library, be selective when acquiring your holdings. Include only items you feel are useful, interesting and technically correct. Get suggestions from fitness and health professionals in your area if you're not sure what to include.

Establish a permanent display area, but organize a travelling library, too. Get a push cart (like the travelling coffee cart) and visit various office and plant locations.

Films and Lectures

These can be offered on an informal once-in-a-while basis or as a regular series covering a variety of topics. Choose films produced, distributed or endorsed by reputable health organizations. Select lecture speakers (and leaders for your demonstrations and workshops as discussed below) with equal care.

When planning film and lecture series, remember that some seasons are better than others. These indoor, educational programs receive strong competition from sunny, summer days. Lunchtime sessions seem to be most popular, so encourage

participants to bring bag lunches. This "eat-while-you-watch" approach is important if you only have a half-hour lunch break.

Demonstrations and Workshops

Workshops, if they include participation sessions, can serve to introduce employees to a wide variety of activities.

Demonstrations are "show-and-tell" affairs, featuring such topics as choosing hiking equipment or preparation and equipment selection for racquet sports. Workshops, if they include participation sessions, can serve to introduce employees to a wide variety of activities. If no on-site space is adequate, community facilities can be booked for these special occasions.

Tying It Together

Special events, theme campaigns and participation in national fitness-promotion efforts can effectively tie together a variety of programs. Canada's Fitweek, a motivational program conducted in late May each year, includes a number of events aimed at employee groups.

B.C. Hydro, the B.C. Government program, and Canada Safeway Ltd. have had good success offering educational programs and time-limited activity competitions for employees in branch and small-office locations.

The Aerobic Mile Superstars Challenge, as an example, encouraged employees of 50 Safeway stores in Manitoba and Ontario to take part in a store versus store competition. This special program was run in addition to the newsletters and educational sessions provided to store employees on a regular basis and the educational and activity programs available to head-office and distribution-centre employees located in Winnipeg.

Evaluation and program planning

While there are elaborate needs-assessment procedures available, the educational efforts discussed above serve as a form of evaluation in themselves. Employee response to these simple programs gives a good indication of their needs and interests. This information, in turn, can be used when making decisions on more costly measures such as sponsorship in outside programs or provision of on-site facilities.

SPONSORSHIP

Experience has shown* accessibility *and* time *to be key factors for a successful employee fitness program.

Experience has shown *accessibility* and *time* to be key factors for a successful employee fitness pro-

Crown Life employees take to the streets in the Crown Life/PARTICIPaction Challenge; Toronto, Ontario

gram. An on-site facility — down the hall or down the elevator — provides the ultimate in convenience. But if a good facility and programs are available next door or just down the street, development of an on-site program may be a costly and needless duplication. With a YM or YWCA, recreation centre or good private fitness club close by, a fitness subsidy may well be the best approach.

While an on-site program ensures accessibility, a subsidy provides far greater flexibility. It allows employees to choose a convenient facility (near home or on a route they normally travel) and one offering activities which most appeal to them.

This flexibility is particularly important for employees working on their own away from an office or plant; it allows them to pick times that suit their schedules. And with many private clubs now offering reciprocal arrangements with clubs in other cities, employees travelling on business can be active out of town at no additional cost. (to help here, companies could also allow employees to include the cost of using out-of-town fitness facilities and programs in their business travel expenses)

Chapter 9 provides additional information on fitness subsidy policies. It considers the advantages and disadvantages and outlines the level of employee involvement to be expected from different types of programs.

PROVISION OF ON-SITE FACILITIES AND PROGRAMS

An on-site facility and program needn't be elaborate or very expensive in order to be effective.

An on-site facility and program needn't be elaborate or very expensive in order to be effective. Small businesses and those with limited financial resources shouldn't discount this option for reasons of cost alone.

After-work programs can be offered in boardrooms or cafeterias, but a shower and change area are essential if participation is to be encouraged at other times during the day. A shower, change room and a hallway for warming up will keep most runners happy. Add secure, covered bicycle parking and you've taken care of cyclists who could commute by bike to work.

Clear some space in a storeroom and a lunchtime exercise class can be offered. Clear a little more space and purchase some equipment and employees can now pursue individual exercise programs. The point of all this is that if you start with the basics and improvise much can be accomplished with little money.

With $3,000 for equipment and 15 square metres of space, Shell Canada provided a modest exercise area for personnel on each of its three fuel ships.

When more than improvising is justified, careful planning is important. With $3,000 for equipment and 15 square metres of space, Shell Canada provided a modest exercise area for personnel on each of its three fuel ships which sail the Great Lakes, the Eastern Seaboard and the Lower Arctic. For a little more money, it renovated space and purchased equipment for a program for the 80 employees of its Jumping Pound Gas Plant, northwest of Calgary.

Orillia Water, Light and Power, a small public utilities commission in Orillia, Ontario, has done much the same. (details of their program are provided in the *Case Studies* section at the back of the book) J.S. Redpath Limited, a mining engineering and contracting company in North Bay, Ontario, has responded as well. Their on-site fitness facility, put in place for about $35,000, including the cost of equipment, now serves about 70 percent of the company's 130 employees.

Facilities for sports and recreational programs can vary greatly in cost and complexity, as well. It could be as simple as a volleyball court on the lawn, basketball backboards in the corner of the parking lot and participation in community leagues *or* as elaborate as the Dofasco Recreation Centre in Hamilton with its hockey rinks, baseball diamonds, soccer/football field, running track, tennis courts and driving range.

Experience with industrial and service sector employees in companies as diverse as the Calgary Herald, Canada Safeway in Winnipeg, and Crossley Karastan Carpet Mills in Truro, Nova Scotia, shows that individual programs and weight-training are of interest to some, but sport and recreational activities appeal to the majority.

While it's appropriate to offer the latter activities — they get many people active who might otherwise not be involved — it's important not to lose sight of the benefits to be derived from the more traditional employee fitness activities.

The program at Alcan Smelters and Chemicals Ltd. in Jonquière, Quebec is an excellent example of what can be accomplished in an industrial setting. The Fitness and Lifestyle program provides:

1) an on-site fitness facility for group fitness classes and structured individualized fitness programs for all employees;

2) intensive programs of back-care and weight control for special groups of employees; and
3) fitness and lifestyle promotion activities throughout the complex.

The success at Jonquière is due to the development of techniques for communicating effectively with industrial workers and quality programs. This has been accomplished over a period of six years through close cooperation between management and a firm of professional fitness and lifestyle consultants.

To be successful, a program must not only serve the already active but entice the sedentary to join in. To do this, an educational component, in combination with a fitness subsidy or on-site facility, will be more effective than any one option alone.

No single formula works for all firms. The unique needs and characteristics of an organization and its employees must be identified and the program designed to meet those needs. A sensible and realistic plan includes the establishing of goals, an offering of programs and a review of interest and evaluation of results, leading to a decision on future efforts.

CHAPTER 7

PROGRAMS DURING TRAINING AND PROFESSIONAL DEVELOPMENT

RON FERGUSON

Training and professional development programs offer unique opportunities to influence employee wellness. Training can involve special courses lasting several months, management training seminars of a few weeks duration or conventions and conferences lasting from one to several days. By including a fitness and lifestyle component in a training program, an organization can:

- demonstrate its concern for the well-being of its employees;
- reinforce a corporate policy that wellness goes with expected performance levels;
- install minimum standards among recruits for jobs requiring high fitness levels;
- motivate and educate present employees to modify existing habits harmful to themselves and the organization;
- facilitate the introduction of a fitness and lifestyle program at the worksite.

Considerable financial resources are allocated to training and professional development. In the federal government, for example, training and development costs averaged 3.5 percent of salary expenditures in 1984-85. At the B.C. Telephone Company, training costs account for 2.5 percent of total payroll.[1] This is a major investment considering that in labour-intensive departments, salaries may account for 95 percent of operating expenses.

Effective fitness and lifestyle interventions can help to remove traditional barriers to learning during the training process.

Maximizing the return on investment in training and development involves creating the most favourable environment possible for the acquisition of new knowledge and skills. Effective fitness and lifestyle interventions can help to remove traditional barriers to learning during the training process, add a new dimension — making the process more personally satisfying — and demonstrate ways to increase human performance on an ongoing basis.

Removing the barriers to optimal learning. If not properly dealt with, training and development programs can face a number of unhealthy conditions – or barriers to optimal learning – including:

- long periods of inactivity;
- stress due to competition and overloaded work schedules;
- meals of poor nutritional quality;
- exposure to cigarette smoke;
- inadequate sleep;
- limited social interaction;
- excess alcohol consumption;
- little time for recreation and relaxation.

When such conditions exist, participants can experience what has been termed "conventioneers narcosis" with symptoms of fatigue, lack of attention, poor scores on tests, low attendance at final sessions and complaints about the seminar's organization and usefulness. These problems can be aggravated by the travel required, unfamiliar accommodations, a disruption of normal habits and the stress of being away from the job or family.

Even with excellent speakers, challenging content and important messages to be conveyed, a conference or seminar may not live up to its potential if the environment is unfavourable. An effective fitness and lifestyle component can do much to create a positive environment, one which is conducive to learning and performance.

Capitalizing on a unique opportunity. Attendance at a course, seminar, convention or conference diverts employees from their normal routines. This

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can be a good thing. Away from day-to-day responsibilities of the job, employees are more prepared to consider new ideas, learn different ways of solving problems, and undergo self-evaluation. In short, they are more open-minded.

Organizations can capitalize on this unique, teachable moment by heightening awareness of the importance of fitness and lifestyle habits, educating individuals on how to make appropriate changes, and motivating them to effect these changes when returning to their regular professional and private lives.

PLANNING THE FITNESS AND LIFESTYLE INTERVENTION

Fitness and lifestyle programs should be considered early in the planning stages when setting objectives for training, identifying participant needs, deciding on a strategy, determining content, choosing facilities and making travel arrangements.

OBJECTIVES

The goal of fitness and lifestyle interventions is to create an environment for optimal learning.

As stated above, the goal of fitness and lifestyle interventions is to create an environment for optimal learning. The specific fitness and lifestyle objectives established will depend on the purpose and duration of the course as well as the characteristics of the participants and the facilities available.

Along with positive educational and motivational objectives, the program might seek to overcome specific conference concerns such as a need for relaxation and breaks from a heavy schedule, alternatives to time spent in bars, and more nutritious food and beverages at meals and breaks.

PARTICIPANT NEEDS

The more knowledgeable the planners are concerning the characteristics of the participants the better the intervention can be planned to suit their needs. A breakdown of the participants by age, sex, language, educational level, and, in some instances, ethnic background is useful. Younger groups of participants, for example, are usually more interested in fitness and lifestyle activities for social and appearance reasons; whereas, a middle-aged group tends to look more for the health benefits. Knowing the makeup of groups allows for appropriate planning.

STRATEGIES

When implementing fitness and lifestyle programs it is important to prepare people ahead of time, get to them quickly on arrival, and integrate fitness and lifestyle into the formal subject-matter of the training program.

Prepare people ahead of time

Whenever possible, inform people of the nature of the program prior to arrival. This can involve suggestions or requirements for exercise clothing or sports equipment, listing the available fitness and recreational facilities, outlining the time planned for physical activity, and furnishing advanced documentation such as lifestyle assessment forms or Physical Activity Readiness Questionnaires (PAR-Qs) in order to save time during orientation. (See Appendix 1 for more information on PAR-Q.)

Get to them quickly on arrival

Inform participants of the objectives of the intervention and explain the benefits to be gained. Start activities the first day (good nutrition, relaxation, physical activity) before bad habits develop and other demands on their time set in.

There is sometimes a tendency to ease up on programs when the conference timetable gets tight or exams approach during a training course. This is when fitness and lifestyle activities are most important and will have the biggest payoff, so guard their scheduled times carefully.

Integrate fitness and lifestyle into the formal subject matter of the training program

Material can be prepared and distributed with other course information and invited speakers or facilitators can discuss the importance of issues such as exercise, nutrition, stress management and back-care. Fitness evaluations can be incorporated into personal assessment profiles and the whole intervention could appear in the published program schedule.

PROGRAM CONTENT

Fitness and lifestyle programs can include a number of components. Comments on a few of the important areas follow:

Exercise opportunities

These range from simple stretch breaks at appropriate intervals during conferences to planned physical activity and sports periods during the course of police or military training. Management seminars often involve group jogging or activity sessions or planned sport activities. Competition should be discouraged at such times — individuals

should be free to participate at their own levels.

Individual needs can be met by offering a fitness test and a personal lifestyle evaluation. During consultation sessions results can be given to participants and exercise programs designed. These programs can be followed throughout the training session and on return to work.

Better nutrition

Good eating habits can help participants stay alert and be more productive. They should be encouraged to eat a nutritious breakfast, avoid large meals late in the evening (which can cause difficulty in sleeping), stay away from "all-you-can-eat" buffets with their extra calories, consider juice instead of coffee at breaks, and eat nutritious snacks rather than sugar-loaded pastries.

Moderating alcohol consumption.

It is possible to obtain the social and relaxation benefits from drinking without the negative effects of overdrinking. Planners should limit the availability of alcohol (time and quantity) at social events. Rather than opening the bar immediately at the end of the work day, schedule other social activities for relaxation and exercise. Make it known that overdrinking can affect enjoyment of, and performance in, the course. With a sensible approach to alcohol consumption, participants will feel better, sleep better, and be more alert.

Handling stress

This is an appropriate topic of discussion for most seminars. In addition, adequate rest and relaxation should be scheduled throughout the program. It is particularly important to offer relaxation breaks during difficult periods or times with heavy workloads. These can involve five to 10 minutes of relaxation techniques, getting participants outside for fresh air and walks, or doing stretch and light exercise breaks indoors.

A well-organized conference or training course can help participants manage stress. Clear objectives, adequate information, challenging subject matter, comfortable accommodations, reasonable travel arrangements, good food and appropriate exercise are all means to reduce the stress related to training and development programs.

Smoking arrangements

This subject requires diplomacy to avoid ill will in the training and development situation. Local bylaws may prohibit smoking in places such as conference rooms, but where this is not the case program planners must deal with the issue at the outset. Smoking should be prohibited in meeting rooms, but with designated smoking areas nearby. In this way, conflict between nonsmokers and smokers will be minimized and participants will not be exposed to the discomfort and health hazards of second-hand smoke. If time permits, a smoking-cessation program could be offered as an adjunct to the training session.

FACILITIES

Fitness and lifestyle interventions are more effective when the training session is offered in a good facility. More and more conference centres, training facilities and hotels are building or renovating space for exercise programs. Where the establishment does not have facilities of its own, ask for a list of fitness and recreation centres or an inventory of activities available nearby. When booking space, preference should be given to establishments with adequate exercise facilities.

Before choosing a facility, get answers to the following questions. Pay a visit or get the information from someone who has been there.

- Are the exercise facilities free or is there an extra charge for their use?
- Is instruction given and what are the qualifications of the instructors?
- Are the premises clean and safe?
- Would you have exclusive use of the facilities at certain times?
- Does the equipment or program offered fit your participants' needs and interests?
- Will they help in planning the fitness and lifestyle component of your seminar or will they refer you to experts who can?
- Will they work with you to provide healthy menus and nutritious snacks for breaks?
- Do they have floors reserved for nonsmoking rooms?

TRAVEL

Providing employees with some tips for healthy travelling prior to departure can be helpful.

Travel to and from training and development programs can be hectic and can disrupt the best intentions. Long flight schedules, inappropriate food and drink and jet lag can adversely affect performance at the course and on return to work. Providing employees with some tips for healthy travelling prior to departure can be helpful.

Jet lag can cause insomnia, headaches, fatigue and irritability. These effects can be minimized by adjusting meal and sleep schedules ahead of time to the time zone of your destination, dressing comfortably for long flights, refraining from alco-

hol and cigarettes en route, eating lightly and taking mini-exercise breaks along the way. When possible, it's helpful if employees can plan time to rest and adjust prior to beginning the course and before returning to work.

PROGRAM EXPERIENCES

The following brief reports demonstrate the scope and variety of fitness and lifestyle programs possible in the training setting. Each one caters to a different target group, with the program content designed to meet the specific needs of the group, fit in well with the overall training program, and take best advantage of the facilities available.

While specific objectives vary from one program to the next, they do have some common features. In all cases, programs were designed to:

- create awareness of the importance of proper lifestyle habits;
- provide activity sessions during the training period;
- provide educational information and lifestyle advice which can be applied once training is completed;
- create an esprit de corps among participants.

Following are the details of four programs incorporated into very different training situations.

EXECUTIVE MANAGEMENT SEMINARS

A fitness and lifestyle component has been successfully included since 1973 in the Career Assignment Program for federal public servants in Ottawa. Dr. Michael Cox, formerly of the University of Toronto, has conducted a similar three-week program for executives of a major oil company.

The latter program was incorporated within the structure of a management training seminar held in Montebello, Quebec. Montebello's "retreat" atmosphere helped participants to concentrate on the objectives of the seminar and to assume — quite naturally — a healthy lifestyle. The exercise and sport facilities, plus the access to nature made the experience even more enjoyable and beneficial.

Professionals in charge of the fitness and lifestyle component were highly involved with the participants and the activities were interwoven with the program throughout the day. Considerable feedback was obtained from participants on a daily basis. The program included:

- *an orientation* – participants were provided with a package of information and exercise clothing; an introductory seminar was conducted and a film shown.
- *exercise testing* – fitness assessments helped determine the frequency, intensity and duration of exercise each participant could safely undertake.
- *educational seminars* – these included film and slide presentations by experts on topics such as the physiological basis of physical activity, nutrition, rehabilitation of sports injuries and stress management.
- *a physical activity program* – the activity program offered three, 30-minute classes per week, instructed by trained fitness professionals; it also included special events and remedial classes such as the "Healthy Back Program."
- *follow-up* – approximately 10 months after the initial program, a reassessment of the managers' fitness levels was administered and an interaction seminar conducted.

The success of the program was demonstrated by the high level of involvement of the participants during the three-week training session and by their interest and participation in the follow-up seminar.

PROFESSIONAL DEVELOPMENT PROGRAM FOR FOREMEN IN AN INDUSTRIAL SETTING

Personnel at the foreman level are increasingly being required to participate in the improvement of working conditions and the training of subordinates.

Personnel at the foreman level are increasingly being required to participate in the improvement of working conditions and the training of subordinates. The latter responsibility can include the areas of health, fitness and safety.

A training program for foremen is conducted by Alcan in Jonquiere, Quebec. It takes place over a 13-month period, in five separate sessions of one to two weeks duration. Total time spent is eight weeks. The sessions are conducted away from the workplace, with 15 participants per group. The seminar is designed specifically to transmit management philosophy and expectations; develop knowledge, skills and attitudes for efficient performance; foster a common orientation for management style; and develop cohesiveness among managers.

The fitness and lifestyle component was de-

signed to complement the training themes of each of the five sessions as follows:

Theme 1: Self-evaluation as a manager. During this period each participant is given a fitness evaluation and a personal lifestyle awareness profile, and is helped to establish objectives to be accomplished during the 13 months of the course.

Theme 2: Acquiring knowledge and learning procedures. Presentations are given on the benefits of physical activity, improving nutrition and preventing back injuries in the workplace. Information is also provided on community resources for physical activity participation.

Theme 3: How to implement. Participants are shown how to set up their own fitness and lifestyle program. The film and booklet "Fitness Head-On" (produced by Occidental Life and PARTICIPaction) are used. Behaviour modification techniques are explained.

Theme 4: Using counselling skills (helping techniques). The physical activity specialist describes real experience from fitness and lifestyle counselling sessions where employees have been helped to improve their health and fitness.

Theme 5: Management stress. Discussions are held to explain the role of exercise in coping with stress. Participants are exposed to other techniques of stress management. They also construct a plan for their personal, future fitness and lifestyle orientation.

POLICE OFFICER TRAINING

In some working situations, a good level of fitness may mean the difference between life and death.

Increasingly, police forces are realizing a need to select fitter officers, to increase fitness levels during basic training, and to improve the fitness and lifestyle habits of current members of the force. A study carried out by the International Association of Chiefs of Police suggests that police officers are at a high risk of cardiovascular disease.[2] The most frequent causes of early retirement are heart attacks and high blood pressure followed by back problems. In some working situations, a good level of fitness may mean the difference between life and death.

Furthermore, it is obvious that unfit officers do not inspire confidence and respect in the eyes of the public. Officers who are in poor health or physically unfit cannot serve the public and cannot be depended upon to aid fellow officers. These problems can be aggravated in forces made up of aging officers.

The Canadian Police College, in Ottawa, offers advanced training in police matters. Run by the RCMP, the College offers a variety of programs, one to 12 weeks in duration, including specialized seminars, middle-management training and executive development courses.

The College has a varied program of fitness and lifestyle activities. Programs range from a three-hour session dealing with health risk factors, to a one-day program on coping with stress, to daily physical activities planned in accordance with the needs and interests of the groups in training. There is also a two-week fitness leaders course for police officers who might then assume the fitness training responsibilities within their own forces.

While the College caters to specific groups, basic training of police recruits is usually carried out in provincial or local institutions and many police forces have instituted fitness programs and minimum standards of fitness among recruits. One example is the Halton Regional Police Force in Ontario. They have made considerable progress since 1983. The purchase of fitness equipment was financed by a Wintario grant and a donation from the Halton Regional Police Association. From within the force, 39 fitness coordinators have been trained by Fitness Ontario under their provincial fitness leadership program. Some personnel have also completed the fitness leadership course at the Canadian Police College in Ottawa.

The Halton program includes minimum fitness requirements for new recruits. These must be met by the candidate prior to being hired and must be maintained throughout an 18-month probationary period. Tests are administered every two months. In 1986, 57 percent of the police force personnel were involved in a regular physical fitness program — a 37 percent increase over the previous year.[3] It is anticipated that involvement in the fitness program will continue to grow among the members of the Halton force. This, in turn, will have a positive influence on sick leave, job satisfaction, productivity and employee morale.

CLC LABOUR EDUCATION STUDY CENTRES

The Canadian Labour Congress (CLC) organizes educational programs across the country. Union representatives attend seminars held in hotels or convention facilities at which time training in union matters such as collective bargaining, arbi-

tration, affirmative action and equal opportunity is conducted.

For several of the seminars, the CLC and Fitness Canada collaborated to provide a fitness and lifestyle component. During these one-week courses, fitness and lifestyle professionals encouraged participants to join in early-morning walking or jogging sessions, distributed fitness information, and conducted exercise breaks throughout the daily schedule. Various educational sessions were offered and fitness assessments were available on a voluntary basis.

Group exercise classes were organized where facilities were present. If no opportunities were available on-site, participants were directed to facilities nearby. Recreational outings for cross-country skiing, volleyball and other activities were also organized, depending on facilities, hotel location and the season.

All activities were organized to promote fitness and a healthy lifestyle in an enjoyable manner, and participants were encouraged to experience the activities with which they felt most comfortable.

The above examples are but a few of those in operation across Canada. They demonstrate the varied nature of fitness and lifestyle programs depending on the duration of the training program, the needs and interests of participants and the facilities available. The scope of possible activities is limited only by the commitment of program planners and the imagination and competence of the fitness and lifestyle specialists involved.

Workers warm-up during a light exercise break at La Brasserie O'Keefe Ltée; Ville Vanier, Québec

CHAPTER 8

THE AMERICAN SCENE

MARTIN COLLIS

One cannot understand the employee fitness and lifestyle picture in the United States without understanding what is happening in the entire health care system.

There is a revolution in health care taking place that is so far-reaching and so profound it is difficult to predict its outcome. The industry is changing rapidly from a staid, conservative, doctor-dominated configuration to a customer-driven, competitive enterprise. It will touch all existing medical institutions and will give rise to new ways of looking at the treatment and prevention of sickness. Major U.S. corporations have played a key role in this revolution and will continue to do so. Its effect will inevitably impinge on Canada and influence the ways in which employers and governments look at their support for fitness and health programs.

The genesis of the change is easy to pinpoint. Quite simply, the cost of health care has inflated so quickly that governments, corporations, insurance companies and individuals have become increasingly reluctant to pay, and in many cases, have been unable to pay.

The national expenditure for medical care in the United States has risen from $12 billion in 1950 to $360 billion in 1985.[1] Looked at another way, health care costs as a percentage of gross national product have grown from 6.5 percent in 1967 to 10.5 percent in 1985. (Currently, in Canada, it is around 8.5 percent.) So a situation existed in the U.S. where people were paying one billion dollars-a-day for health care, where General Motors was paying more for health costs than for steel, and where Chrysler estimated that health benefits were costing them more than $500 a car.

Insurance companies and the U.S. business community began to look carefully at what they were paying for health, and would no longer accept enormous medical bills without question or scrutiny. One of the significant responses to the situation has been the development of the Health Maintenance Organization (HMO) that provides medical treatment for a flat fee per year, often at considerable savings to a company. Initially, much of the savings made by HMO's have been related to shorter hospital stays, more outpatient care and a careful review of surgical procedures. However, in their continued efforts to keep costs down, some HMO's are now beginning to live up to their name and provide increasing numbers of health enhancement opportunities to their clients.

Corporations are now willing to invest large sums of money on fitness and wellness in order to avoid spending even bigger sums on sickness, absenteeism, loss of productivity and employee turnover.

With hospitalization costs rising, organizations have increasingly turned to the fitness and wellness movement for their fiscal salvation. Corporations are now willing to invest large sums of money on fitness and wellness in order to avoid spending even bigger sums on sickness, absenteeism, loss of productivity and employee turnover. Insurance companies and HMOs, as noted above, have a powerful fiscal interest in keeping their clients healthy. And finally, hospitals with falling revenues from sickness are themselves turning toward health and fitness programs as a means of generating income.

A climate has been created where all the major players are supportive of fitness and health initiatives and the impact on the employee fitness and wellness landscapes has been dramatic.

THE ASSOCIATION FOR EMPLOYEE HEALTH AND FITNESS

The growth of fitness in business and industry is reflected in the growth of the Association for Fitness in Business (AFB). The association, originally called the American Association of Fitness Directors in Business and Industry (AAFDBI), was founded in 1974 by some 25 fitness directors and exercise physiologists who believed that fitness and health promotion was a growth area in the corporate landscape, in need of professional direction. Since that date, its membership and professionalism have grown each year — by 1986 membership exceeded 3,500.

The demographics of AFB's membership reflects the changing employee health and fitness picture. Hospital-related memberships now outnumber individual corporate fitness memberships, reflecting the increasing prominence of hospitals in the health/fitness field and the growing tendency of companies to turn to external providers to deliver their wellness programs.

While AFB has assisted greatly in the development of the American corporate fitness industry, Canadian experts have recognized the need for a similar Canadian organization. A 1986 federal/provincial/territorial government publication has

suggested the need for a Canadian employee fitness association geared towards promoting the concept of workplace programs and providing an opportunity for program coordinators to network.[2]

THE INSURANCE INDUSTRY

BLUE CROSS AND BLUE SHIELD

Blue Cross and Blue Shield have a combined share of approximately 50 percent of the private health insurance business in the United States. Their size puts them in a powerful position to negotiate favourable contracts with hospitals, physicians and other health providers.

Blue Cross and Blue Shield health promotion activities include direct health enhancement initiatives (provision of educational materials such as their *Building a Healthier Company* booklet), health problem detection program (many Blue Cross/Blue Shield plans offer screening for hypertension and other risk factors associated with heart disease and cancer), and innovative contractual arrangements.

An example of the latter is the Staywell benefits package for the Mendocino, California, County Office of Education. In the Mendocino plan, $500-a-year or any unspent portion of it, builds for each employee, collectable when they leave or retire. Meanwhile, interest in the pool accrues to the education office which can use the money for purchase of additional program equipment. Both Blue Shield and the Office of Education report that after the introduction of Staywell, employees began exercising, watching their diets and making positive efforts to get their money back.

OTHER INSURANCE COMPANY INITIATIVES

A recent trend has seen insurance companies merging with hospital chains so that one organization looks after both the wellness and sickness needs of clients.

In the limited space available, it is impossible to describe the variety of health and fitness initiatives undertaken by insurance companies for their own employees and for their clients. For details, see *Health Promotion in the Workplace.*[3] It includes an entire chapter on the insurance industry.

A recent trend has seen insurance companies merging with hospital chains so that one organization looks after both the wellness and sickness needs of clients. An example of this sort of union was the joining of Equitable Insurance of New York and the Hospital Corporation of America into Equicorps.

In a similar arrangement, the Travelers Insurance Company has worked with the Center for Corporate Health Promotion to develop the "Taking Care" program for their company. Along with a health/fitness center in the corporate headquarters in Hartford, Connecticut, an outreach program serves employees in other locations *and* clients. Programs and services include a health-risk appraisal and lifestyle strategy guidebook, a Personal Health Record, a copy of the *Take Care of Yourself* book, the monthly *Taking Care* newsletter, and three times-a-year "Focus" programs which highlight specific health and lifestyle topics.

A study of the Taking Care Program showed: (i) more than 90 percent of participants and 90 percent of their families use the materials; (ii) a 17 percent decline in total medical visits and a 35 percent decline in minor illness visits; and (iii) an estimated savings of three dollars for every dollar invested in the self-care and lifestyle education program.[4]

WELLNESS COUNCILS

Insurance companies have played a leading role in the development of Wellness Councils in many areas of the United States. Mr. William Kizer, Chairman and CEO of the Central States Health and Life Company in Omaha, Nebraska, and the driving force behind the development of WELCOM (Wellness Council of the Midlands), describes the role of the councils as follows:

> "The mission of Wellness Councils is to promote wellness at the worksite. This mission is guided by the conviction that the quality of life in any community is in large degree measured by the health of its people and as more employers offer quality programs, not only will more individuals benefit, but the spiraling costs of health care can be better contained."[5]

All the main segments of American business are represented in WELCOM, including agri-business, manufacturing, transportation, retail, utilities, insurance companies and the wholesale trade. Companies range from five-person offices to the 6,000-member work force at Mutual of Omaha's World Headquarters. WELCOM (which has served as a blueprint for other Wellness Councils) brings together a splendid blend of providers — both profit and non-profit — and consumers of health, where all can work together to their mutual advantage.

Wellness Councils are remarkable examples of cooperation among employers. In some ways they are like a Chamber of Commerce of health and fitness. The Wellness Council model is well worth considering — one which could function effectively in Canadian communities.

EXAMPLES OF SUCCESSFUL COMPANY PROGRAMS

When the first edition of *Employee Fitness* was published in 1977, the General Foods Health/Fitness program was featured as one of the few model programs in existence in the United States. Today one could choose from literally thousands of successful worksite programs. Profiles of three such programs follow to give an idea of the creativity involved and the breadth of activities and services which can be provided.

CAMPBELL SOUP COMPANY

The Campbell Soup Company philosophy has a powerful health-related orientation. They wish the company name to be associated with health, good nutrition, fitness, and a positive lifestyle. To this end they provide a major head office health/fitness program for their employees, produce a nutritious product line, and act as good corporate citizens by supporting numerous health- and sport-related enterprises.

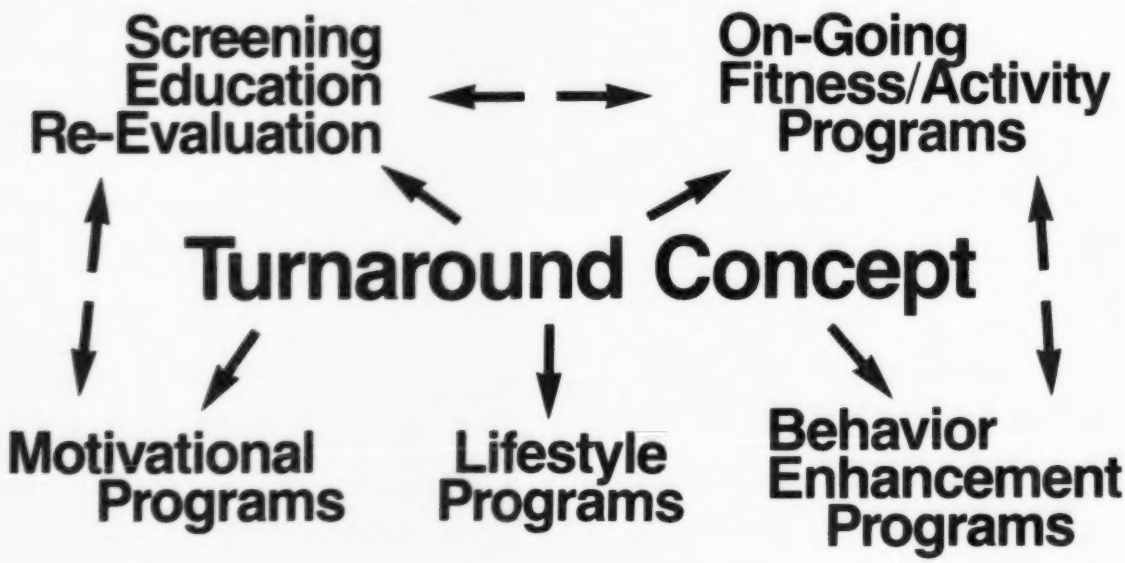
This support is administered through the Campbell's Institute of Health and Fitness. The Institute was opened in 1982 and by 1986 had an operating budget of more than $2.5 million. The Institute has become a major backer of research and a strong supporter of conferences and meetings in the area of health and lifestyle.

Campbell's Canada reflects a similar positive lifestyle philosophy. It has become a high profile corporate sponsor of conferences in such areas as physical education, nutrition, sport, lifestyle and medicine, besides it's prominent association with the 1988 Winter Olympics in Calgary.

The Campbell's head-office initiative — called the Turnaround Health and Fitness Program — offers a wide range of exercise, motivation, and lifestyle-change programs for its employees in Camden, New Jersey. The scope of the program is shown in Figure 1.

Of the 1,500 employees, 76 percent have gone through an extensive health/fitness screening program, 58 percent are actively involved in programs and 40 percent exercise 2.5 times per week or more.

Figure 1. The Turnaround Concept.



Of the 1,500 employees, 76 percent have gone through an extensive health/fitness screening program, 58 percent are actively involved in programs and 40 percent exercise 2.5 times per week or more.

The basic fee structure is $100-a-year, shared equally by employer and employee. Upon renewal,

if the participant has remained active (2.5 times-a-week or more), the fee for the second year is $25 and after a third year of involvement the participant is not charged. Retirees, families and dependents can participate for a nominal fee.

Figure 2 shows the central role exercise plays in the scheme of things. Developing the program concept around a core of exercise has enabled the participants to have a common focus, and offers consistent, positive reinforcement for their lifestyle-change efforts. The behaviour enhancement programs assist participants currently exercising to develop and maintain other positive health behaviours, while offering non-active employees a viable, non-threatening choice of health behaviours until they feel comfortable with increasing their activity level.[6]

The Turnaround Program evolved from careful consultation with employees and management. It produces many of its own educational and motivational materials, including books, booklets, newspapers and exercise music. Research is ongoing to measure the impact of the program on employees, and the concept is now being applied to other company facilities around the country.

MESA PETROLEUM COMPANY

In 1979, Mesa Petroleum, in Amarillo, Texas, constructed a head office fitness facility featuring a gymnasium with indoor running track; aerobic-exercise room; large weight-training room; four racquetball courts; shower and change areas with whirlpools, steam, and saunas; and a subsidized health bar which dispenses soup, salad, and juice. The company purchased annual health club memberships in local facilities for employees located outside Amarillo.

Figure 2. The Exercise Core of the Lifestyle Program.

Writing in *Fitness in Business*, Dr. Larry Gettman summarized data collected in 1982 and 1983. In 1982, 58 percent of employees participated in exercise programs; in 1983, participation was up to 63 percent. Based on calorie expenditure, Dr. Gettman found that there was a strong inverse relationship between exercise level and absenteeism in both years. He also calculated that by 1983 the fitness program paid for itself by recovering 107 percent of the budget spent on each employee.[7]

An intriguing aspect of the program is the Well-Plan that provides cash incentives for exercising, not smoking, lack of absenteeism, and not drawing on the company's medical plan.

An intriguing aspect of the program is the Well-Plan that provides cash incentives for exercising, not smoking, lack of absenteeism, and not drawing on the company's medical plan. Company owner T. Boone Pickens feels that the fitness program, which he uses regularly himself, is an important part of the success of Mesa Petroleum.

JOHNSON AND JOHNSON

A study done at four Johnson and Johnson companies, reported in the February, 1986, issue of *Journal of the American Medical Association*, highlights the importance of program and promotion, in addition to screening and information, if positive behaviour changes are to take place.[8]

Employees at four companies (2600 individuals in all) were exposed to the "Live for Life" health promotion program, while employees at three other comparable Johnson and Johnson companies (1700 people) were offered only annual health screening. After two years, health screening information was obtained on 96 percent of the original cohort of employees who were still employed with the company.

The results of this investigation demonstrate that a company-wide exercise initiative can produce a widespread and clinically significant increase in the number of employees who exercise regularly. Total daily energy expenditure in vigorous activity increased 104 percent among employees at companies with health promotion programs but only 33 percent among employees who were exposed to annual health screening. The aerobic capacity increased 10.4 percent in employees at the health promotion program companies, a remarkable improvement in that it reflects an average increase in an entire population and not just those who chose to participate in formal exercise classes. This population increase in physical fitness approaches 50 percent of the response normally seen in intensive laboratory-based exercise training programs.

The key finding of this study is that a worksite public health intervention model produced impressive improvements in exercise and physical fitness. This intervention approach focused attention on the entire work force and attempted to change the health environment of an entire company. It produced exercise changes that persisted over a two-year period and were widely distributed throughout the entire work force. Improvements in exercise and physical fitness were associated with beneficial changes in coronary heart disease risk factors and in several psychosocial variables.

LEADER PREPARATION

Because of the variety of talents required to manage major worksite wellness programs, careful preparation of leaders is crucial. One of the more interesting responses to this has been the M.Sc. program in Health/Fitness Management at American University, in Washington, D.C. In essence, students do a double major, working in the College of Business Administration to develop marketing, managerial and accounting skills, and in the area of Human Performance, to study nutrition, behavioural medicine, computer applications to health/fitness, and exercise testing and prescription. Another important aspect of the course is the practicum, or internship. The program is demanding, expensive and highly selective, but American University has no difficulty in placing its graduates.

LEGISLATING FITNESS OPPORTUNITIES

A key feature of the Act is that state agencies have access to financial support for their health and fitness programs, the rationale being that public money spent for these programs serves an important public purpose.

In 1983, a unique piece of legislation was enacted in Texas in the form of the State Employee Health Fitness and Education Act.[9] The Bill specifies that health and fitness opportunities be provided to employees of state agencies and students and staff of institutions of higher learning. The Act was created to address the following objectives:

- reduction of escalating medical care costs;
- reduction of state employee absenteeism;
- reduction in disability and worker's compensation expenditures;
- increased employee morale and activity.

A key feature of the Act is that state agencies have access to financial support for their health and fitness programs, the rationale being that public money spent for these programs serves an important public purpose.

Regardless of questions about program design, fitness and lifestyle programs are now an important part of the American corporate scene. Over the past five years there has been uninhibited, aggressive experimentation, and out of this will emerge solid, applied data regarding the fiscal and health benefits of worksite wellness.

As Dr. Robert Allen notes: "Any company that asks itself the crucial questions about human and

economic costs will find that it cannot afford *not* to search out the roots of its illness problems and do something about them."[10] In the end, the successful companies will be those that can make sufficient impact on their corporate cultures so that healthy behaviours are normal behaviours.

CHAPTER 9

COMMON QUESTIONS AND ANSWERS

DOUG COWAN

Employee fitness and lifestyle programs have come a long way in the last decade. Not only are there more programs available, but they are increasingly more sophisticated. In the process of this development, certain questions have been asked time and again by companies seeking to install a successful program. Here are the 10 most common.

HOW DOES A COMMITTEE GO ABOUT GETTING ORGANIZATIONAL APPROVAL TO PROVIDE A FITNESS PROGRAM FOR ITS EMPLOYEES?

Employee fitness advocates should be prepared to talk about the various cost containment features of the product.

There are three major steps to be accomplished. The first step is the hardest. It involves justifying the expenditure of corporate "overhead expenses" on such a venture. (see Chapter 3 for a detailed discussion of costs and benefits) Since most executives will want to know how the program will affect the bottom line, employee fitness advocates should be prepared to talk about the various cost containment features of the product.

This information can form the content of a *justification proposal*. When developing the proposal, it is crucial that key officials in the company are interviewed so that their ideas, concerns, biases, reservations, needs and objections are ascertained before the proposal is finalized and submitted.

If the proposal receives reasonable support, the second step is to survey the employees themselves. Where the justification proposal took a one-on-one interview approach, the *needs survey* of employee interest can be done by questionnaire.

If constructed properly, the needs survey can establish the type of program the company should have; assess what kind of facility (if any) is warranted; and determine what the objectives of the program should be, when it should be operated, and what kind of supervision will be required. In essence, the survey will tell the committee if it should proceed to "sell" the concept to senior management.

The* business plan *should describe the program, including any professional staffing requirements; specify the size and type of facility (if any); and outline a budget including all related capital and operating costs and anticipated membership revenues.

If the first two steps are positive, a third and final step is usually necessary before the executive of any company is prepared to commit resources — a business plan. The *business plan* should describe the program, including any professional staffing requirements; specify the size and type of facility (if any); and outline a budget including all related capital and operating costs and anticipated membership revenues.

ONCE THE DECISION HAS BEEN MADE TO GO AHEAD WITH A PROGRAM, WHAT HAPPENS NEXT?

There are five major considerations between approval of the idea and opening the doors.

Facilities

If there is a facility involved, the committee will have to work with architects, engineers, interior designers and contractors. Equipment and finishing will have to be specified, tendered, ordered and installed. Arrangements must be made for secur-

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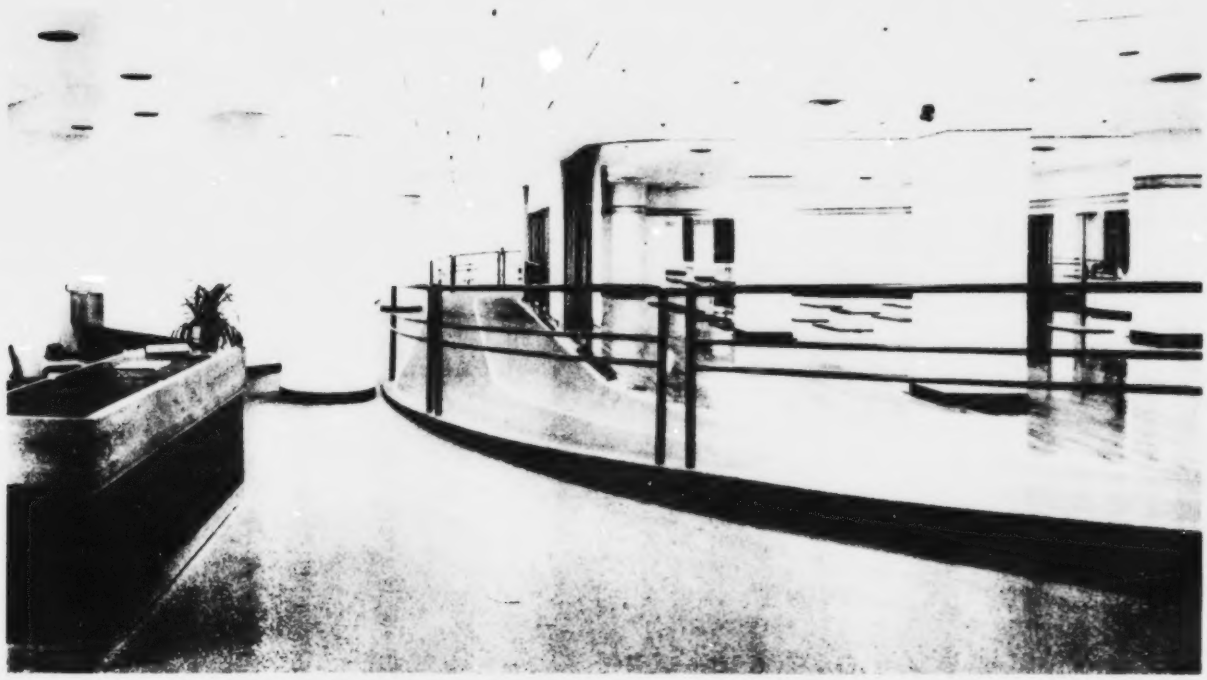


After hours at the Shell Fitness Centre; Calgary, Alberta

ity, cleaning and ongoing maintenance once the facility is completed.

Policies

Certain policies will have to be developed regarding how the facility and program will be operated. These include hours of operation, membership eligibility, fee rates and schedules, insurance coverage, name and logo. A formalized organizational structure will also have to be considered.

Administrative procedures

Considerations here include how members will be screened, programmed and monitored; how their membership and physiological records will be maintained and secured; financial control systems; management information systems; staff and membership dress codes; membership rules and regulations; and emergency procedures.

Staffing

If one or more professional staff will be hired, the committee must determine the qualifications and experience required; develop job descriptions; specify the proposed reporting relationship; and then recruit, screen, hire, and orient the staff.

Program marketing

Communicating with employees and developing a sense of ownership, excitement and commitment among the target group will greatly affect the success of the program. The committee will have to confirm the specific program components, pricing schedules and promotional mix. Consideration must be given to campaigns which will successfully recruit and retain the membership.

IF A COMPANY IS GOING TO MAKE A CAPITAL INVESTMENT IN AN ON-SITE FITNESS FACILITY, HOW CAN IT BE SURE IT WILL BE SUCCESSFUL?

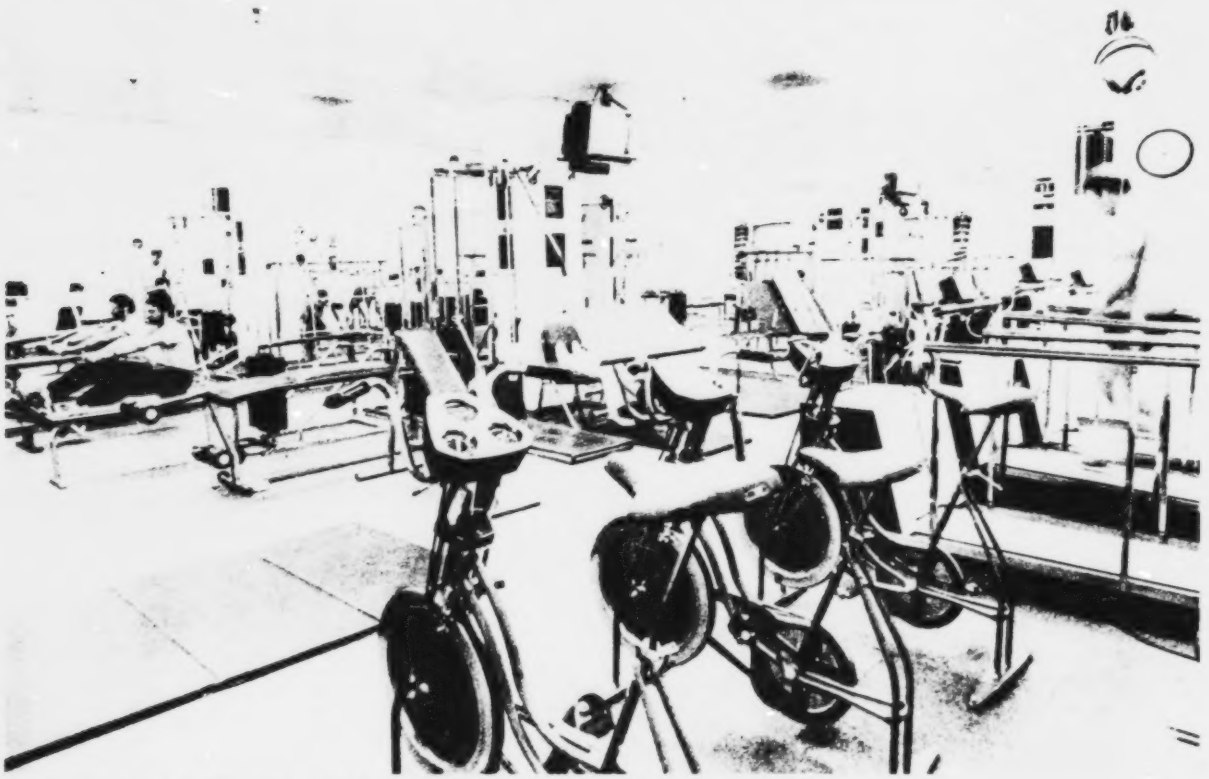
Long-term program success depends on eight fundamental concepts as follows.

Sufficient management commitment

Successful programs have the support and visible endorsement of a company's senior officials as well as the supervisors, managers and informal leaders within the ranks of the organization. Their "ownership" and support of the program is nurtured and maintained by providing ample opportunities for input and by keeping them informed on an ongoing basis. Their involvement, in turn, serves as a model for others in the company. This is the most important prerequisite for program success.

Professional leadership

Employees must know that staff members are professionally trained and knowledgeable in the organization and administration of health and fitness programs. Nurturing the growth and development of the program is a big task; it requires that the



The Fitness Centre at Texaco Canada Inc.; Don Mills, Ontario

professional staff work with employees at various organizational levels to achieve results.

Supportive company environment

Individual changes can be made, but they will not last unless there is a "culture" that supports them. This supportive culture means that "good health" within the workplace becomes a company norm; positive health is promoted through company communications; opportunities are available for the development of individual health skills; and different kinds of support groups are available.

Clarity of purpose

The program should focus on the positive, (i.e., optimal individual health) and strive for long-term results rather than short-term improvements. This means helping employees add zest and vitality to their lives as well as eliminating some of the more detrimental lifestyle risks. It also means developing programs which promote a sense of joy and fun, pleasure and excitement about health, recreation and fitness.

A focus on tangible organizational results

By emphasizing results, program activities are chosen based on their predicted tangible outcomes. Results need to be planned for and measured on four levels:

- individual quantitative data — kilograms lost, cardiovascular fitness improved, etc.;
- program quantitative data — number of people in a program, percentage of employees taking part in support groups, areas of the company covered, etc.;
- company quantitative data — absenteeism, turnover, and productivity measures;
- company qualitative data — changes in organizational health norms, changes in employee attitudes, and support of positive health practices.

Program opportunities should be made available to* all *employees within the company.

A focus on the total employee population as the target market

Program opportunities should be made available to *all* employees within the company. This principle represents a basic recognition that the provision of health enhancement benefits or services should not discriminate between individuals on the basis of age, sex, ethnic background, employee category or location.

Involvement of people at ALL levels

The threat of change within an organization is diminished if all those who will be affected by it have an opportunity to influence the nature and extent of the change. Ownership for the program should be clearly in the hands of all employees, not just senior management or program staff.

A systematic and integrated "cultural" approach

Every organizational culture has a number of key influence areas. These include communications and information systems and orientation and training programs. The health enhancement program should use these influence areas to best advantage. Attempts should also be made to recognize, reinforce and reward the efforts of employees who adopt positive health practices.

WHY SHOULD A COMPANY SERIOUSLY CONSIDER ITS OWN "IN-HOUSE" PROGRAM?

i) There are a variety of benefits to an in-house program. The more important ones are as follows.

- The company can exert close control over the outcomes of the program, make continual adjustments to attain the desired results and react quickly to employee demand.
- The program can be closely aligned and integrated with the objectives of the human resources and/or the occupational health or medical departments.
- The program represents a catalyst for the development of a whole host of other employee interest groups and related programs, (i.e., it represents a base from which a company health culture can be spawned).

ii) An in-house program, on the other hand, poses a few downside risks.

- If a facility is involved, it requires a substantial initial expense before any program benefits accrue.
- A facility-based program usually requires the additional expense of professional staff to manage it.

An in-house, facility-based program requires a *committed* interest on the part of the company to play a *direct* and *active* role in achieving a long-term objective.

WHAT KIND OF FACILITIES SHOULD BE CONSIDERED?

Development of an in-house facility can follow one of several alternatives, including renovating existing company space; leasing additional space in the same building or an adjacent building; arranging for joint-use of space with other companies in the same building or area; or building entirely new facilities.

The Group Exercise Area at the Crown Life Fitness and Recreation Centre; Toronto, Ontario

The degree of commitment required by a company to provide any of these options is high. The company must, therefore, be assured that employee participation will be sufficient to warrant the capital expenditure.

When facilities are being developed, great care must be taken in the design of locker and shower rooms, group- and individual-activity areas, administrative space and laundry/storage areas. A full discussion of these design features is beyond the scope of this book. For more information on the topic see Appendix 1.

SOME COMPANIES PROVIDE A "SUBSIDY" POLICY FOR THEIR EMPLOYEES RATHER THAN DEVELOPING THEIR OWN IN-HOUSE PROGRAM. WHAT IS A SUBSIDY POLICY AND HOW DOES IT WORK?

Under this scheme, the company subsidizes the cost of an annual membership fee to a fitness centre or club by reimbursing the employee for some or all of the cost. Differences occur in the degree to which companies will reimburse their employees for memberships, the timing of such subsidies, and whether the company makes the subsidy conditional upon frequency of participation or approves

only programs or facilities which meet certain criteria.

In setting the maximum amounts of a subsidy and estimating the number of employees who will probably participate, the following guidelines should act as a good rule of thumb.

- Five to eight percent of a company's population is probably already active with no incentive provided by the company.
- Perhaps five percent (not necessarily the same group) will already be members of some form of fitness, recreation, sport or social club.
- If the policy provides reimbursement upon joining or if there are no quality-control measures on the type of program or program adherence, 15 to 20 percent of the employee population will participate.
- If the policy provides the subsidy at time of registration and does not discriminate between the type of program or club joined (fitness, recreation, sport or social), 30 to 40 percent of employees will take advantage of it.
- If the policy specifies fitness activities only and reimburses employees retroactive to meeting certain participation conditions, about eight to 10 percent of employees will participate.

Benefits of a subsidy program

The Canadian Chamber of Commerce estimates that 41 percent of companies with employee fitness programs offer subsidies to local clubs.

- Although it may require as much financial support as an in-house program, it requires less commitment. No capital facility is created, and the program can be terminated at any time.
- No integration or co-ordination with existing programs or departments within the company is required.
- It offers flexibility. A company can get a "feel" for the employee fitness idea, while keeping its long-range options open.
- It demonstrates a commitment in terms of financial support, without truly requiring any management philosophical support (i.e., the ability to be perceived as committed, if employee attitude is a key factor).
- It can be used as an adjunct to a health promotion program where no on-site facility is available.
- For reasons of size, space or location, some companies have no other option than to provide this type of program. In fact, the subsidy program is popular. The Canadian Chamber of Commerce estimates that 41 percent of companies with employee fitness programs offer subsidies to local clubs.[1]

Shortcomings

- Employees who take advantage of the policy will not be participating in a "company program", nor will they necessarily be involved with other employees of the company.
- In most cases, the company has no control over the program.
- The goal of most clubs which employees will join is to gain and retain them as members. The efficacy of the program may not necessarily be a primary concern.
- It is questionable whether club subsidies affect many employees beyond those who are already active.
- From a financial standpoint, employees pay their fees with after-tax dollars and, in some cases, must even report the subsidy on their personal income tax returns. This reduces the financial incentive inherent in a subsidy program.

Ultimately, if the objective of the subsidy policy is to encourage those not already active to become more active through participation in a legitmate fitness program, then the policy should stipulate appropriate criteria, list the clubs to which the policy pertains, and apply it after the successful completion of a program.

WHAT IS A COMPANY'S LIABILITY EXPOSURE WITH REGARDS TO AN IN-HOUSE EMPLOYEE FITNESS FACILITY?

The company, as owner and occupier of the fitness facility, is liable for the condition of the facility and should adequately plan liability coverage.

The company, as owner and occupier of the fitness facility, is liable for the condition of the facility and should adequately plan liability coverage. An owner/occupier owes a duty to those permitted or invited on the premises to provide a safe place to carry on activity and to guard against dangerous conditions which it knows of or should reasonably know of.

To carry out its responsibility, the company should do regular inspections and testing of premises and equipment for safety and cleanliness. It should also take all reasonable security measures such as appropriate locks, proper signage, controlled entry, establishment of emergency pro-

cedures, provision of a waiver form, and supervision of facilities as well as age limits, health screening, program prescription and instruction sessions for users.

Contact with the department handling the company's insurance matters is recommended in the early stages of planning a fitness program. Each year the company should inform its insurance carrier of the hazards to be covered and the details of all the properties. It is possible that a company's insurance cost may increase with the inclusion of a fitness facility, but it shouldn't go up significantly.

Personal injury awards are not as high in Canada as those seen in the United States, but they are gradually creeping toward the $1 million mark as costs of medical care and loss of income rise. Coverage will, no doubt, keep pace with these considerations, but at an increasing premium cost.

Workers' Compensation Board benefits* do not *extend to employees injured while participating on their own time on a voluntary basis.

Requesting a signed waiver before an employee is permitted to use the facility provides some security to the company and is a reminder to users to take care. However, the company should not put total reliance on such waivers. Courts have refused to give effect to such releases and waivers where they felt that the person signing such a document could not be held to have contemplated the negligence or intentional damage that could occur.

One final point — Workers' Compensation Board benefits *do not* extend to employees injured while participating on their own time on a voluntary basis.

WHAT OTHER STEPS CAN A COMPANY TAKE TO MANAGE ITS RISK?

The following policies and procedures should be adopted by a fitness centre in agreement with the company.

Emergency procedures

In the event of an emergency during hours when the company health centre is unsupervised, a direct call for outside emergency help should be made.

All injuries, accidents or medical problems that take place in the fitness centre should be documented by means of a medical emergency report. This document should be signed by the first-aider and co-signed by the fitness co-ordinator. A copy of this report should go to the health centre, with the signed copy staying on file in the fitness centre.

Staff qualifications

All fitness centre staff, including any volunteer leaders, apprenticeship program students, and outside contract leaders should be certified annually in CPR and first-aid. Any person conducting a fitness test should have completed the CASS Fitness Appraisal Certification and Accreditation Program. (see Appendix 1 for more information.)

Health screening

Prior to taking a fitness assessment, each individual should complete an agreement and waiver form, PAR-Q (Physical Activity Readiness Questionnaire) and a personal health data form. These forms should be reviewed by a fitness centre staff member prior to the assessment appointment.

Special considerations

Certain health conditions, including history of heart disease, serious prior back injuries or complaints and the late stages of pregnancy require special attention. Policies should be developed regarding the supervision and participation of individuals experiencing these conditions or concerns.

WHAT ARE THE REASONS FOR FITNESS TESTING?

Fitness testing is helpful to:

- determine the physiological effects of participation in an exercise program;
- develop individualized exercise prescriptions;
- motivate for continued participation.

The test of aerobic fitness included in the assessment battery should be a non-diagnostic, predicted, submaximal test such as that included in the Canadian Standardized Test of Fitness (CSTF). More information on the CSTF is included in Appendix 1.

Following an initial assessment, the test may be repeated in three to six months if the individual has progressed enough to warrant a new exercise prescription. Additional tests can be conducted whenever a new exercise prescription is to be administered. After extended participation in the program, an individual will reach a plateau in conditioning and continue with a maintenance program. Once maintenance is the objective, assessments need only be administered annually or bi-annually.

Although the fitness centre will most often be managed by professional staff, any procedures conducted in the centre which might affect the health and/or safety of members — including exercise testing — should be subject to approval by the company.

A full one-third of Canadian employee fitness

Employee receives fitness appraisal from Fitness Director at Texaco Canada Inc.; Don Mills, Ontario

programs offer regular fitness appraisals to program participants.[2] As the Canadian Association of Sport Service's (CASS) Fitness Appraisal Certification and Accreditation Program expands, the number of employee fitness programs offering appraisals is expected to increase.

WHAT REASONABLE MEASURES SHOULD BE TAKEN BY A COMPANY TO ACT IN A RESPONSIBLE MANNER?

While some of these issues have been dealt with in answering previous questions, here is a final checklist.

- Involve a representative of the company's liability insurance carrier in a consideration of the insurance coverage for the fitness facility. You should be able to tell him the size of the facility, the type of equipment being used, the range of programs offered, the kind of pre-exercise screening used and the type of organization and supervision. Ask for a written position or "rider" on liability coverage.
- Provide the same kind of information to the Workers' Compensation Board and request a written position from them regarding their coverage of injuries sustained in the program.
- Consider needs for supervision of the facility during operation. Is this supervision reasonable and responsible?
- Provide for the inspection and repair of premises and equipment on a regular basis.
- Provide education for proper and safe use of equipment by participants.
- Provide policies, rules and warnings for locations, equipment or situations that could cause injury if not correctly treated.
- Encourage, or make mandatory, medical check-ups/authorizations and a general release (waiver) form.
- Ensure that reasonable measures are taken to secure the fitness facility from inappropriate, unauthorized or unsupervised use.
- Ensure that adequate emergency procedures are established in the event of injury or illness in the fitness facility. Written guidelines should be developed to cover all possible forseeable emergencies. Accident report forms should be readily accessible and filled out immediately after an accident or injury.

CASE STUDIES

The following case studies provide an overview of program approaches to fitness in the workplace. They also present a national view, since these model programs are located in different regions of the country. The programs profiled are as follows:

Type of Program/ Organization	*Company*	*Location*
office building	B.C. Telephone Company	Vancouver
blue-collar	Calgary Herald	Calgary
small business	Orillia Water, Light & Power	Orillia, Ont.
non-facility	Maison Alcan	Montreal
branch office	Computer Works	Toronto

While the cases have been organized to provide the general information noted below, each one includes details which best show its strengths, challenges, unique characteristics and issues of interest based on the type of organization it serves.

Case Components

- company profile (type of business, employee demographics, etc.);
- program launch;
- leadership/place in the corporate structure;
- facilities and equipment;
- programs and services;
- special/unique components, other important information.

BRITISH COLUMBIA TELEPHONE COMPANY

The B.C. Telephone Company headquarters is located in the Vancouver suburb of Burnaby. With a building population of 2,900, some 1,200 or 41 percent of employees participate in the various activities and services offered by the fitness program. Approximately 60 percent of the program participants are women. Facility usage is 600 to 700 "participations" per day.

The program was launched in 1977 with the opening of the company's newly-constructed head office which included a 835 square metre (9,000 sq.ft.) fitness facility. The program, managed by a coordinator, has one additional full-time fitness specialist, part-time instructors and 20 fully certified volunteer instructors. The volunteer leaders are all employees who work in other departments of the company.

The program comes under the company's Health Services Department, with the manager of employee fitness reporting to the Director of Health Services. Capital costs of the program are provided by the company; operating costs are covered by employee-participants, through payroll deduction.

The facility includes an aerobics area with a sound system; stationary exercise bikes, rowing machines and exercise mats; a separate weight-training area; shower, change, and locker areas; a fitness assessment room; and office space. A road overpass provides safe, easy access to an adjacent public park offering a 400-metre running track, running trails, outdoor swimming pool and tennis courts.

Social, athletic and recreational programs are offered along with the traditional fitness activities. Forty-five group classes are available each week, as well as courses or programs in weight-training, self-defense, soccer, volleyball and running. Other services include seminars, special events, fitness assessments, dietary analyses and lifestyle counselling.

By 1987, the company had added seven satellite programs to complement its efforts at the head office. Three of these serve employees at other Vancouver-area locations, with additional programs in Victoria, Kelowna, Kamloops and Prince George. The Prince George program, operated by a volunteer coordinator, is a rebate incentive program involving several community facilities and some 75 employees. All other satellite programs offer on-site fitness facilities and part- or full-time staff (except Kamloops which is an unstaffed drop-in facility).

Funding for the satellite programs is the same as at the head office — the company provides the space and start-up costs, while operating expenses are totally membership supported. The manager of employee fitness oversees the operation of programs at all eight sites, with coordinators at each site reporting to him. Volunteer advisory committees at each location assist with decision-making regarding policies and programs.

CALGARY HERALD

The Calgary Herald located in Calgary, Alberta, produces the city's major daily newspaper. Of the approximately 980 employees, 376 (or 38 percent) are in what would typically be called blue-collar jobs. Of the entire workforce, 62 percent are men and 61 percent are between the ages of 20 and 39.

The program began with a demand study conducted by Fitness Management, Inc. in 1980. Positive results of the study led to the development of a program plan and design of an on-site fitness facility for the Herald's new building which was in the planning stages at the time. The fitness facility opened for operation in February, 1982.

Program management is on a contract basis with the consulting firm that carried out the initial study. A full-time director coordinates the efforts of part-time contract fitness leaders and company employees who have been trained to serve as volunteer leaders. While the fitness centre operates separately from occupational health, there is collaboration on a variety of educational efforts such as Heart Month, Nutrition Month and blood-pressure screening programs.

The 215 square metre (2300 sq.ft.) facility includes group and individual exercise areas, men's and women's shower and change areas, a fitness assessment room and office space. Equipment in the group-exercise area includes a high-quality sound system and various light equipment (skipping ropes, surgical tubing, etc.) for use by class participants. The individual-exercise area is furnished with a multi-station stack-weight machine and dumbells for strength training as well as stationary bicycles and rowing machines.

Motivational and educational programs are provided on a variety of topics and employees can participate in special events such as Canada's Fitweek activities and local road races. Fitness assessments are provided prior to participation in individual or group exercise programs. A newsletter is distributed to members two or three times-a-year and awards are used to recognize regular attendance.

Use of the fitness centre is free to all employees and open 24 hours-a-day (supervised from 10:00 a.m. to 6:00 p.m.). Attempts are made to schedule programs to meet the varied needs of day and night shifts, set and flexible time, and field workers.

The most challenging part of the program is getting the blue-collar employees involved. Activities that have helped in this area are coed volleyball, hockey and softball leagues and badminton. While the former activities are not organized directly by fitness staff, badminton is offered in the fitness centre as a recreational activity.

In May, 1983, 33 percent of employees were members of the fitness centre. The number of "active members" (those using the centre two or three times-a-week) was 13 percent of the employee population. In September, 1986, 45 percent of employees were members, with 14 percent in the "active" category.

ORILLIA WATER, LIGHT AND POWER COMMISSION

Orillia Water, Light and Power is a small public utilities commission producing hydro electric power in Orillia, Ontario. It has 58 employees; nine women (ages 25 to 55) and 49 men (ages 25 to 60). Fifteen of the employees are administrative or clerical personnel; 43 are outside workers.

Employee interest sparked the birth of the program as outside workers were concerned about a lack of activity in the winter months and a desire to do something about it. With advice on programs and equipment from the fitness coordinator of the local YMCA, an employee representative proposed the idea to the secretary-manager of the commission.

The commission provided a locker-room area in the service centre and paid for materials to clean and paint it (all of which was done by prospective participants). Equipment was purchased with money from fund-raising, a loan taken out by the newly formed fitness club and a Wintario grant.

The 65 square metre (700 sq.ft) facility has a stationary exercise bicycle and rowing machine for cardiovascular conditioning and a nine-station stack-weight system and free weights for strength training. Change rooms and showers are available nearby. Because of the size of the facility and the number of employees, no group exercise sessions are offered, but the centre is available seven days-a-week, 24 hours-a-day for individual programs.

Since there is no formal coordinator and the facility is unsupervised, the program relies on the common sense and care of employees. In the first three-and-a-half years of the program (to the time this case was prepared), there had been no injuries or accidents and no abuse of the equipment.

Twenty-three of 59 service centre employees (40 percent) use the facility regularly along with about 10 spouses. Participation is greatest September through April, with some of the employees turning to recreational and sport activities for the summer months.

A four-member committee meets when necessary to discuss such things as facility maintenance or the need for new equipment. A modest membership fee is paid by employees (there is no cost for spouses), with the money used for the purchase of supplies and new equipment. While the program was not intended as a profit-making venture, it usually has a small reserve of money in its credit

union account.

Perhaps the most interesting aspect of this small-business program is that it was initiated and built by employees and it is maintained by them on an ongoing basis.

MAISON ALCAN

Maison Alcan, located in Monreal, is the world headquarters for Alcan, one of Canada's largest multinational companies and the world's largest exporter of aluminum. Of the 500 employees, 55 percent are women, 45 percent men. The age range is 19 to 75, with an average age of 41. Staff consists entirely of professional and clerical personnel.

The Canadian Public Health Association took on management of the program on a contract basis in the Fall of 1984, following a needs assessment completed the previous Spring. The fitness consultant directing the program works four days-a-week, reporting to both the vice-president responsible for matters concerning the building and its occupants and the vice-president of the Environmental Health and Safety Department. A fitness program advisory and action committee meets once-a-month to assist the fitness consultant with her programming efforts. Committee members are also involved in program design, budgeting and evaluation.

The program aims to increase awareness of the relationship between a healthy lifestyle and a sense of well-being, to improve the fitness levels of employees by providing activity incentive programs, and to foster a sense of community among company personnel. The program is a theme-based motivational and educational effort with no immediate plans for an in-house facility.

Eight to 10 themes are promoted each year, drawn from areas such as nutrition education, weight control, stress management, back-care, physical fitness, alcohol and substance use and abuse, smoking cessation and hypertension control. Each theme campaign lasts four to six weeks with special courses and noon-hour presentations supported by printed educational materials and a regular newsletter.

Prizes, awards and reduced rates on educational courses are used as motivational tools. As well, to encourage commitment and adherence, employees are always required to pay a portion of the cost of programs in which they participate. The company share of costs is covered by an annual operating budge of about $25,000.

A corporate rate for employees has been arranged at the local YMCA. Employees can enrol in 12-week exercise sessions at a reduced rate or purchase yearly memberships at the corporate discount rate. Showers in the basement of the office and bicycle racks provide the basics for cyclists and runners, and space in the employee lounge is available for small exercise classes after work.

The program demonstrates that a serous commitment can be made to employee fitness and valuable programs can be offered to employees without an on-site facility. Effective motivational and educational programs along with a fitness subsidy arrangement work well for Maison Alcan.

COMPUTER WORKS*

Computer Works operates in the sales and administration sector of the computer hardware business. Its head office, in Toronto, has 600 employees, with an additional 1,000 employees located at 10 branch offices across the country. The staff — comprised entirely of professional and clerical personnel — is 60 percent men, 40 percent women. The average age is 32.

The program was implemented in 1983 at a time of company-wide staff cutbacks. Senior management was looking for a program which would build morale, reduce stress and improve productivity during this difficult time. Following a needs assessment and the formation of a volunteer fitness advisory committee, a one-year pilot program was launched at head office. It was expanded the following year to include all locations. The program operates independently of health services which has a part-time nurse.

The program is coordinated by one full-time fitness professional employed on a consultant basis and located at the head office. The six-member fitness advisory committee at head office, along with one representative from each of the 10 branch locations, comprise what is known as a "fitness network team." For network team members at the branch offices, jobs have been structured so that fitness and health promotion responsibilities occupy about 25 percent of their time.

The fitness and lifestyle program is designed specifically to address the needs of a company with an extensive branch-office operation. A fitness subsidy is available to employees at all locations (for participation at accredited fitness centres) and fitness assessments are conducted on-site at each branch office by a local professional.

* Computer Works is a composite of a number of corporate programs. It is included to show the unique challenges and opportunities facing companies with a network of branch offices.

Programs include monthly health and lifestyle themes with related seminars, events and contests; individual counselling and group seminars on topics such as back-care, nutrition, stress management, smoking cessation, CPR and first-aid; walking and jogging clubs; and team-oriented activity contests like a weight-loss challenge and Christmas "turkey trot." Support resources and materials include *The Fitness Network* (quarterly newsletter), an exercise self-starter kit, bulletin board displays and a Wellness Resource Centre.

The fitness coordinator conducts quarterly training workshops for Fitness Network members and provides them with resources and promotional materials on an ongoing basis. She also pays an annual visit to each branch office.

The most unique feature of this program is the effective use of volunteers to facilitate fitness and lifestyle efforts at the various locations. The company's serious commitment to the program — demonstrated by the inclusion of fitness and lifestyle program responsibilities in the job descriptions of the Fitness Network members — makes this arrangement possible.

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1. Canadian Chamber of Commerce. *Fitness and Health Promotion by Canadian Business*. (Ottawa, 1987), p. 9
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APPENDIX 1

ADDITIONAL RESOURCES

The following additional resources are recommended for those who wish more detailed information on various aspects of fitness and lifestyle programs at the workplace. Wherever possible, the names of the resources and the supplier/publisher are provided:

Printed Materials

Fitness Works
Fitness in the Workplace — A concept whose time has come.
Fitness: Solutions for Small Business.
Fitness and Health Promotion by Canadian Business.
Summary of the 1983 Labour Fitness and Lifestyle Project.
Employee Fitness and Lifestyle Project — Toronto 1977-78.
Running Dynamic Conferences.
Canadian Standardized Test of Fitness.

Fitness Canada,
365 Laurier Ave. W.,
Ottawa, Ontario.
K1A 0X6
(all materials available, in limited quantities: free of charge)

Employee Physical Fitness Facilities — Design Recommendations.

Health Promotion Directorate,
Health and Welfare Canada,
Ottawa, Ontario,
K1A 1B4
(booklet available free of charge).

A Planner's Guide to Fitness in the Workplace.
A Cost Benefit Guide to Fitness in the Workplace.
A Decision Maker's Guide to Fitness in the Workplace.
Employee Fitness...The How-to Practical Manual.
Work Site Labour Fitness.

Sports and Fitness Branch,
Ministry of Tourism and Recreation,
77 Bloor St. W.,
Toronto, Ontario
M7A 2R9
(all materials available free of charge)

The following recommended books are available through local bookstores in Canada:

O'Donnell, M.P. and T. Ainsworth (Ed.). *Health Promotion in the Workplace*. New York: John Wiley and Sons, Inc., 1984.

Patton, R.W. and others. *Implementing Health/Fitness Programs*. Champaign, Ill: Human Kinetics Publishers, 1986.

Kizer, W.M., *The Healthy Workplace*. New York: John Wiley and Sons Inc., 1987.

Shephard, R.J., *Fitness and Health in Industry*. Basel: Karger, 1986.

Audio/Visual Resources

Employee Fitness Slide Show
(Produced by Fitness Canada)

LM Media Marketing
115 Torbay Rd., Unit # 9,
Markham, Ontario
L3R 2M9

Key Organizations and Programs

Fitness Appraisal Certification and Accreditation Program

Canadian Association of Sport Sciences
FACA Program
333 River Road
Ottawa, Ontario
K1L 8H9

Fitness In Business
(bimonthly journal)

Association for Fitness in Business
965 Hope Street
Stamford, Connecticut 06907
U.S.A.

For additional first-hand information about employee fitness and lifestyle programs, contact your provincial government department responsible for health and/or fitness or visit an existing employee fitness program in your area.